PHILIP MORRIS USA INTER-OFFICE CORRESPONDENCE

120 PARK AVENUE, NEW YORK, NY 10017-5592

TO: Distribution **DATE:** December 20, 1991

FROM: Marketing Information & Analysis/Ellen Fitzgerald

SUBJECT: INDUSTRY COUPON ACTIVITY

Attached are the latest monthly trends of the Full Margin and Price Value competitive supermarket and convenience store coupon information (through November 3, 1991) as reported by various data sources.

Full Margin

- Full Margin couponing for the industry in supermarkets remained flat at 17% of volume sold on coupon. This level of activity is low relative to the first three quarters of 1991, but consistent with the prior period. Additionally, FM coupon activity versus the prior period declined in Convenience outlets: -7 points to 13% volume sold on deal.

- R.J. Reynold's support of Full Margin brands in supermarkets for the Fourth Quarter 1991 remained low relative to the remainder of the year: 18% volume sold on coupon. In addition, coupon support to C-Stores declined significantly: -17 points to 26% volume sold on coupon. However, coupon values for RJR's Full Margin brands increased and the supermarket coupon vehicle shifted to predominantly on-carton.

- Due to an increase in PM's support to FM during this period (+4 points to 17% volume sold on coupon), PM's level of FM coupon activity was, for the first time, consistent with RJR's. PM's increase was driven by residual direct mail coupons for Marlboro and FSI's evident for Virginia Slims, Merit and B&H.

- Lorillard reinstated the $4.00 Catalina $olution register receipt program in support of Newport during Fourth Quarter 1991. Overall support to the brand remained low: 6% volume sold on coupon.

Price Value

- PV couponing for this period reached an historical high (57% volume sold on coupon) with all key manufacturers increasing coupon levels and values. Increased levels of support continue to primarily reflect higher coupon activity/values to Sub-Generic brands.

- RJR increased Price Value support +5 points to 78% volume sold on coupon. This represents the highest level of couponing historically for RJR's Price Value brands, as well as the highest level of Price Value support among the manufacturers. This shift was driven by increased coupon availability and values to Doral this period. The manufacturer decreased overall support to Sterling and Magna, although, RJR did increase the levels of higher value couponing ($2.00) for the Sub-Generic brands.

- B&W and Liggett increased the level and value of coupon support to Sub-Generic entries Raleigh Extra and Pyramid.

If you have any questions or comments, please do not hesitate to call.

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Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

DISTRIBUTION

A. Aliksanyan	C. Finch (R3)	C. Johnson	R. Mikulay	N. Parmet	R. Stirlen
M. Antonoff	T. Garguilo	L. Johnson	E. Mize (R2)	U. Peters	L. Suwarna
R. Anise	H. Glastein	J. Kuhlman (R5)	J. Mortensen	R. Pettinelli	M. Szymanczyk
D. Beran	A. Goldfarb	L. Lembo	M. Nawrocki	S. Piskor	J. Taylor
S. Bloom	R. Gordon	C. Levy	B. Neidle	J. Raporte	R. Tomei
R. Camisa	J. Greene	N. Lund	J. Nellenbach	S. Sabella	S. Vasquez
J. Chaump	P. Henriques	M. Mahan	D. Nelson (R1)	T. Saloun	P. Volz (LBC)
C. Cohen	J. Heironimus	R. Martindale	S. Norris	B. Schuyler	B. Weinstein
D. Dangoor	B. Hopkins	T. McCarthy	B. O'Brien	R. Simons	L. Wexler
J. Eibon	S. Jannetta	E. Merlo	R. Olsen (R4)	J. Spector	T. Worcester

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Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

FULL MARGIN FINDINGS

- Full Margin couponing for the industry in supermarkets remained flat at 17% of volume sold on coupon. This level of coupon activity is low relative to the first three quarters of 1991, but consistent with the prior period. Additionally, FM coupon activity versus the prior period declined in Convenience outlets: -7 points to 13% volume sold on deal.

  Lower levels of couponing in both supermarkets and C-Stores were driven primarily by declining support by RJR to their major Full Margin brands. Total coupon activity in supermarkets remained flat versus the prior period, although significantly lower across certain brands relative to 1st, 2nd and 3rd Quarters 1991 including: Winston: 14% of volume, Salem: 24% of volume, Camel Filters: 4% of volume and Vantage: 27% of volume. In C-stores, couponing support declined significantly versus the prior period for Winston -44 points to 16% volume sold on coupon, Camel Filters -10 points to 15% and Salem -13 points to 21%.

  The decrease in supermarket couponing activity is attributable to declining levels of media-delivered and direct mail programs. On-carton couponing for RJR's FM brands, which had declined significantly in the prior period, increased for the most current period. In addition, higher value coupons were evident for Camel ($4.00 couponing represented 16% of couponed volume), Salem ($3.00/$4.00 couponing represented 76% of couponed volume), Vantage ($3.00 couponing represented 54% couponed volume). However, levels of $3.00/$4.00 value couponing for Winston declined versus the prior period: -28 points to 36% of couponed volume

- Philip Morris' Full Margin activity increased slightly this period: +4 points to 17% of volume sold on coupon. The impact of Marlboro's recent direct mail effort is still evident, with 11% of the brand's volume sold on coupon in supermarkets.

  Merit, Virginia Slims and Benson & Hedges indicated relatively high levels of coupon activity (17%, 29% and 26%, respectively), reflecting recent FSI coupon activity for each of these brands.

- Brown & Williamson's support to Full Margin brands increased versus the prior period: +6 points to 15% of volume, driven by increased levels of couponing for Kool. Following a trend similar to Fourth Quarter 1990, coupon support for Kool increased significantly: +10 points to 25% of volume, with $3.00 on-carton coupons as the primary vehicle. B&W is not currently supporting either Capri or Belair Full Margin with coupons.

- Lorillard reinstated the $4.00 Catalina $olution program in support of Newport during Fourth Quarter 1991. However, the brand's overall level of coupon support remains low (6% volume sold on coupon), with the register receipt coupons representing 58% of couponed volume. Coupon support for Kent increased slightly this period (+5 points to 22% of volume) driven by a $2.00 FSI coupon program. On-carton couponing decreased for True during this period, with couponing redemption down -12 points to 46% of volume.

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Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

- Liggett's support of FM brands decreased slightly versus the prior period, driven by declines in Eve's FSI coupon activity. Additionally, coupon support declined for Lark (-15 points to 10% volume on coupon), as Liggett decreased on-carton support to the brand.

PRICE VALUE FINDINGS

- Industry levels of Price Value couponing reached a new high this period: 57% of volume sold on coupon, +4 points versus the prior four-week period, with RJR, PM, B&W, Liggett and American increasing levels of support to Price Value brands.

- RJR increased Price Value support +5 points to 78% volume sold on coupon. This represents the highest level of couponing historically for RJR's Price Value brands, as well as the highest level of Price Value support among the manufacturers.

  Importantly, the increase in support to RJR's PV brands was driven primarily by increased couponing for Doral (+4 points to 86% volume sold on coupon). In addition to increased levels of support, RJR continues to increase coupon values for the brand: $4.00 coupons represented 57% of Doral's couponed volume and $4.50/$5.00 coupons represent 8% of couponed volume.

  RJR's support to Sub-Generic brands decreased this period (Sterling, -46 points to 35% volume sold on coupon and Magna, -23 points to 43% volume), however, coupon values increased ($2.00 coupons represented 70% of Sterling's and 55% of Magna's couponed volume).

- Philip Morris' support to PV brands increased +3 points to 72% volume sold on coupon. Cambridge's volume on coupon remained relatively flat (79%), however, $4.00 couponing for the brand increased +8 points to 52% of couponed volume. Coupon activity for Alpine increased this period (+8 points to 70% volume sold on coupon), and, as with Cambridge, the level of higher value couponing also increased: $4.00 couponing increased +28 points to 59% of couponed volume.

  Coupon activity for Bucks increased +3 points to 32% volume sold on coupon. Some FSI activity is evident for the brand (11% couponed volume), however, the primarily coupon vehicle remains $3.00 on-carton coupons (83% couponed volume).

  Bristol's volume sold on coupon remained relatively flat at 69% versus the prior period with $1.00 on-carton coupons the primary coupon vehicle.

- Brown & Williamson returned to former levels of coupon support for Viceroy after posting a declined during the prior period: +10 points to 62% volume on coupon. B&W continued to support Viceroy primarily with $4.00 on-carton coupons: 90% of couponed volume. $5.00 on-carton couponing declined versus the prior period: -18 points to 3% of couponed volume. Overall coupon support for Richland 20's declined versus the prior period: -18 points to 39% volume sold on coupon. As with Viceroy, the primary coupon vehicle for this brand is $4.00 on-carton coupons: 81% couponed volume. There is no evidence of $5.00 couponing in supermarkets for this brand.

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Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

- American's support to their Sub-Generic entries increased +5 points to 60% volume sold versus the prior period. Volume sold on coupon increased for Misty (+18 points to 28%), while Bull Durham remained flat (21%). Both brands continue to be supported primarily by FSI's. Coupon support to Montclair increased +3 points to 55% volume sold on coupon, with on-carton couponing as the primarily coupon vehicle (64% couponed volume). Additionally, some media-delivered couponing is evident for the brand (25% couponed volume).

  B&W increased support to Sub-Generic entry Raleigh Extra this period with increased levels of coupon support (+5 points to 60% volume sold on coupon) and coupon values ($2.00 coupons increased +22 points to 33% couponed volume).

- Following the lead of the remaining manufacturers, Liggett increased support to Sub-Generic entry Pyramid: +11 points to 48% volume on coupon. Support included $1.00-off carton FSI (19% couponed volume) and $1.00/$2.00 on-carton couponing.

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Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

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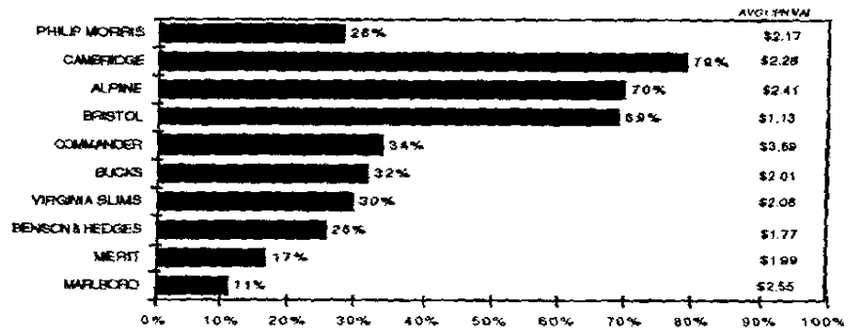
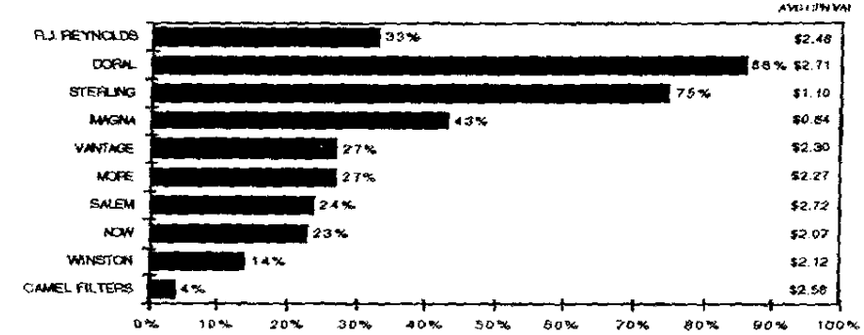
PERCENT VOLUME SOLD ON COUPON AND AVERAGE COUPON VALUE
SUPERMARKETS



R.J. REYNOLDS
PERCENT VOLUME SOLD ON COUPON AND AVERAGE COUPON VALUE
SUPERMARKETS



BROWN & WILLIAMSON
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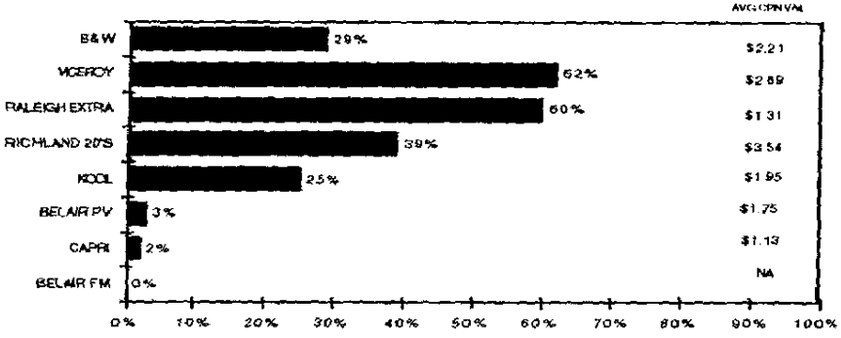

AMERICAN
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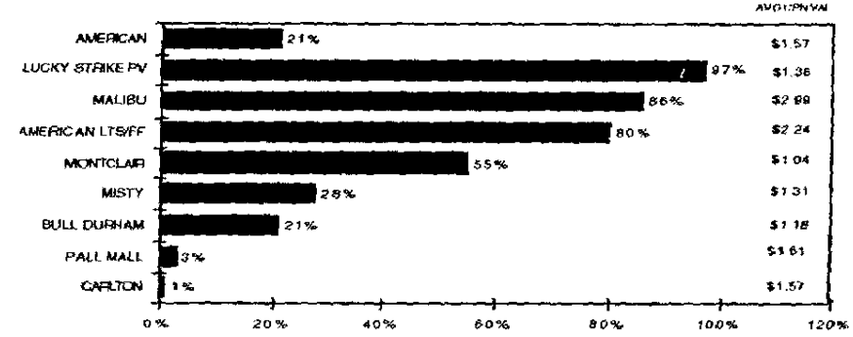

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LORILLARD
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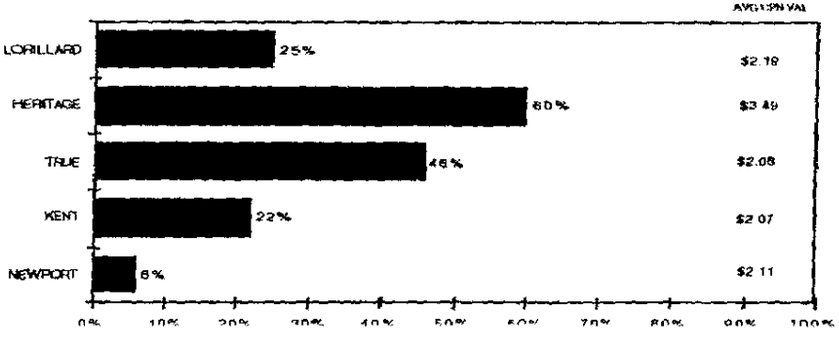

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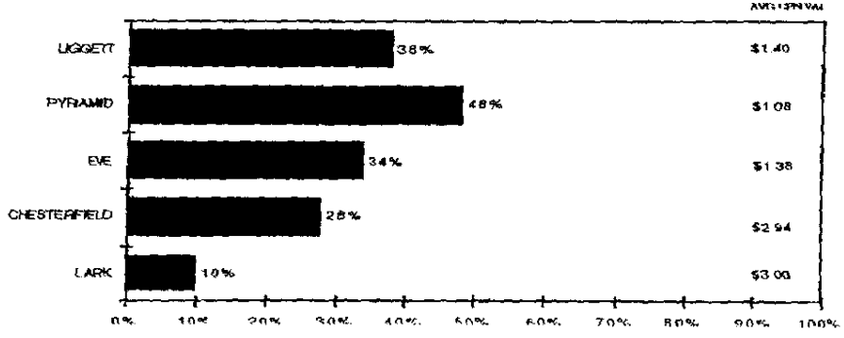

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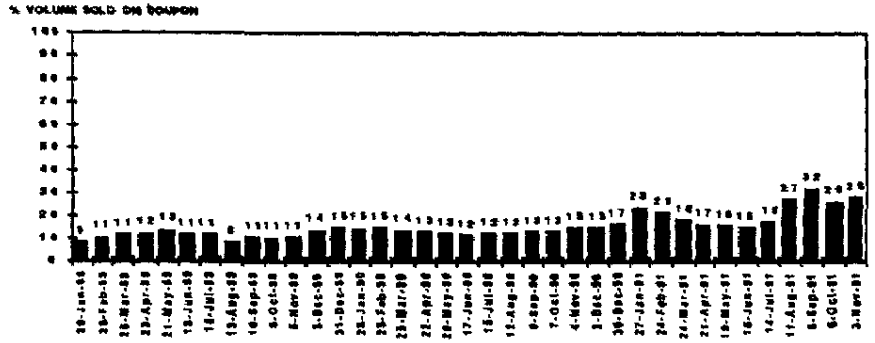

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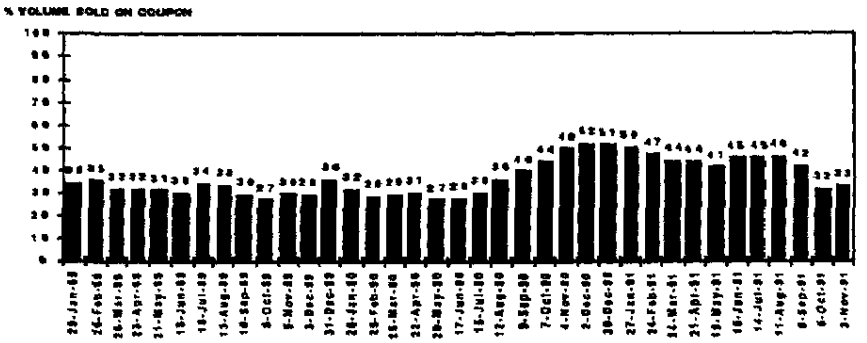

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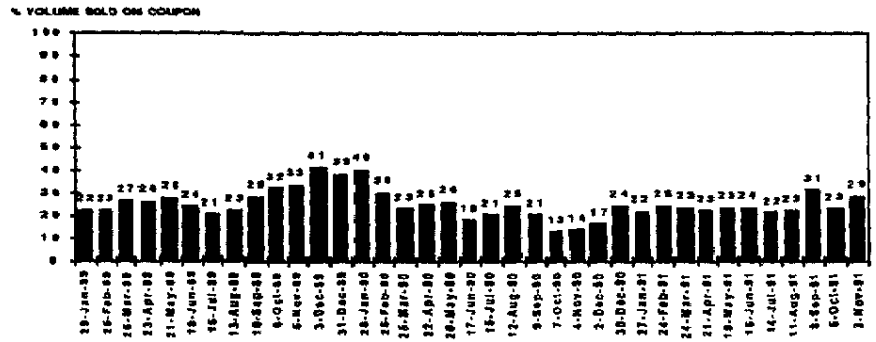

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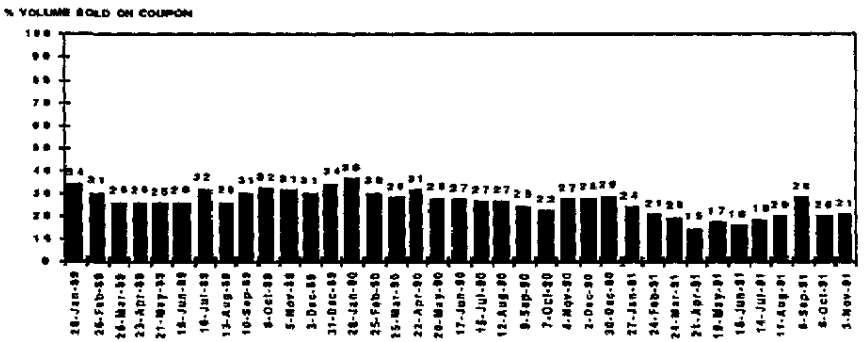

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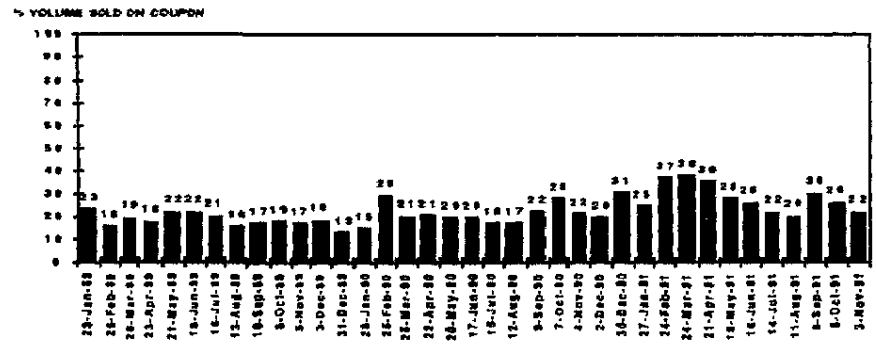

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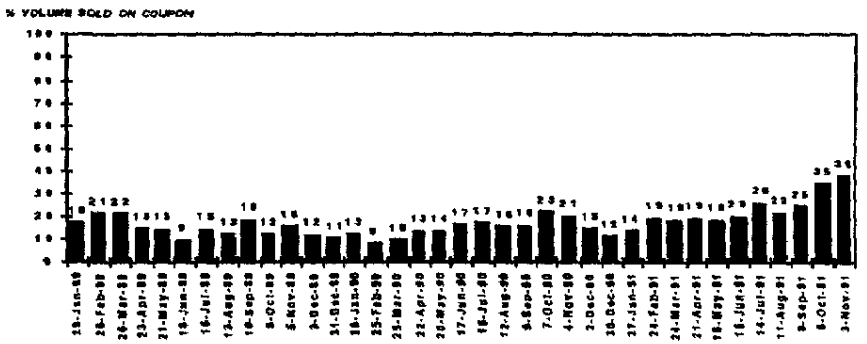

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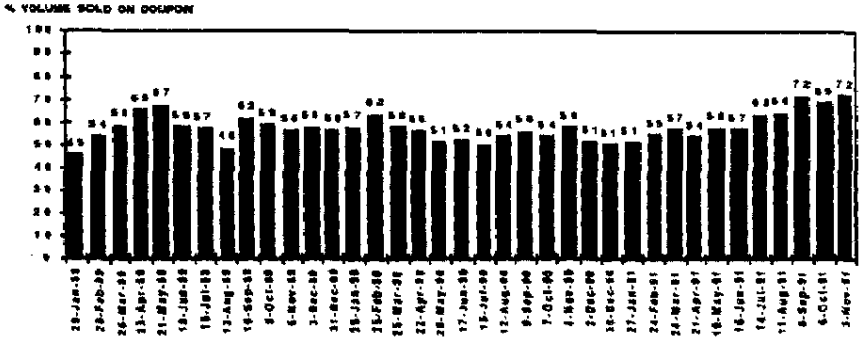
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



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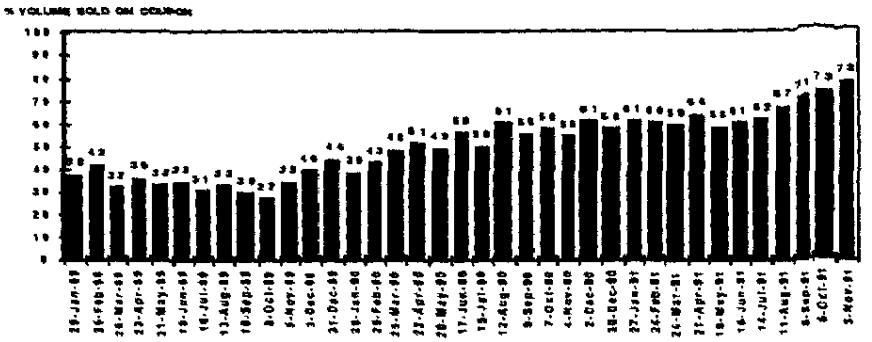

BROWN & WILLIAMSON PRICE VALUE
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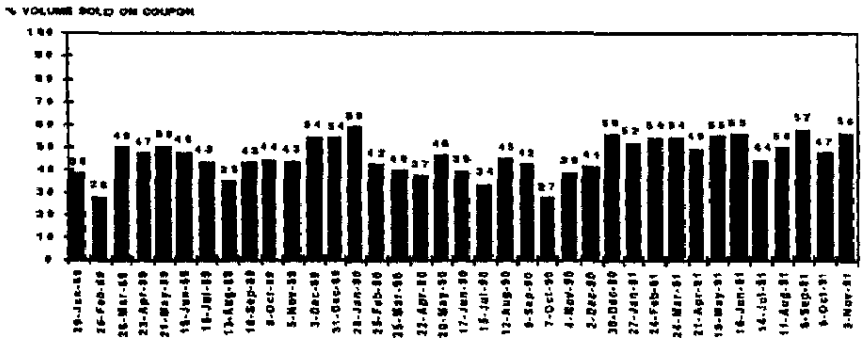

AMERICAN PRICE VALUE
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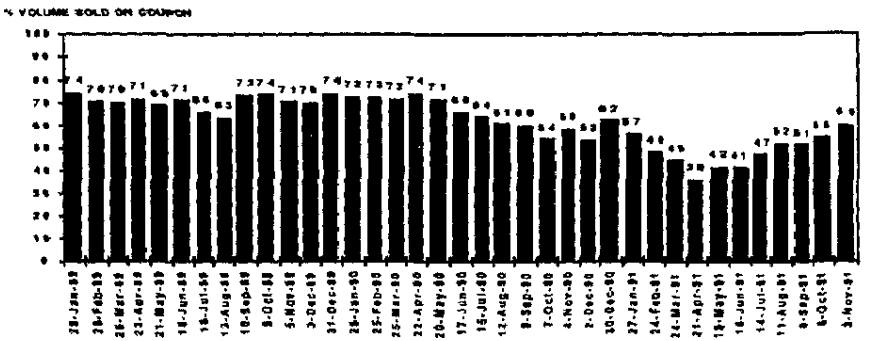

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LORILLARD PRICE VALUE
PERCENT VOLUME SOLD ON COUPON
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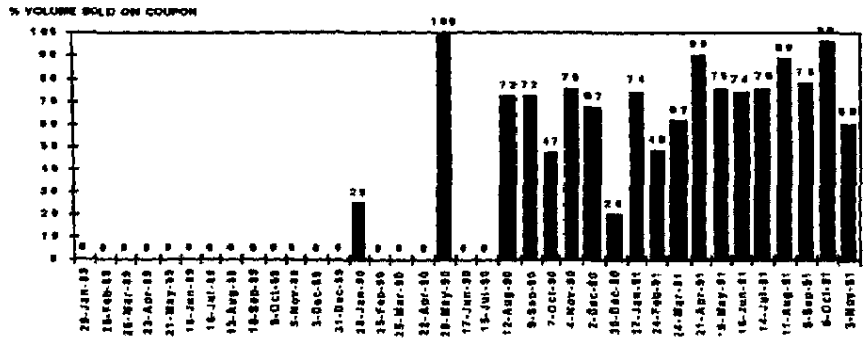

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PERCENT VOLUME SOLD ON COUPON
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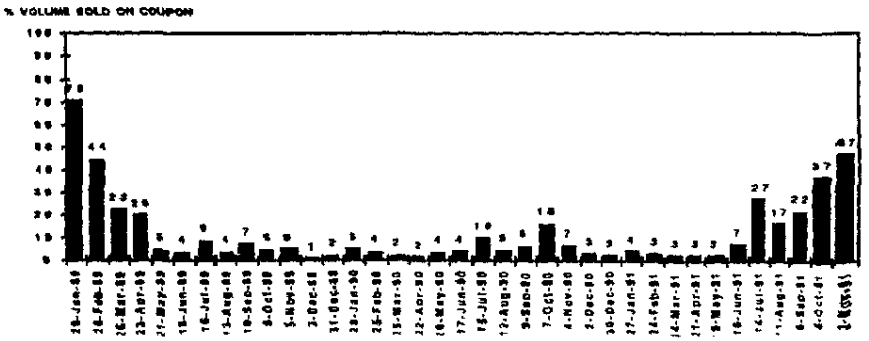
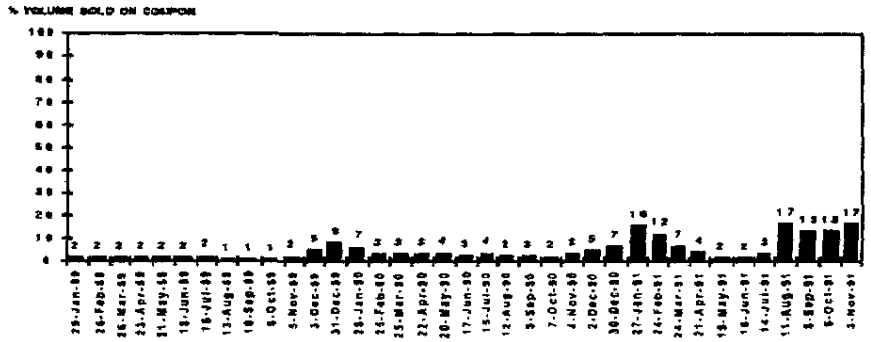


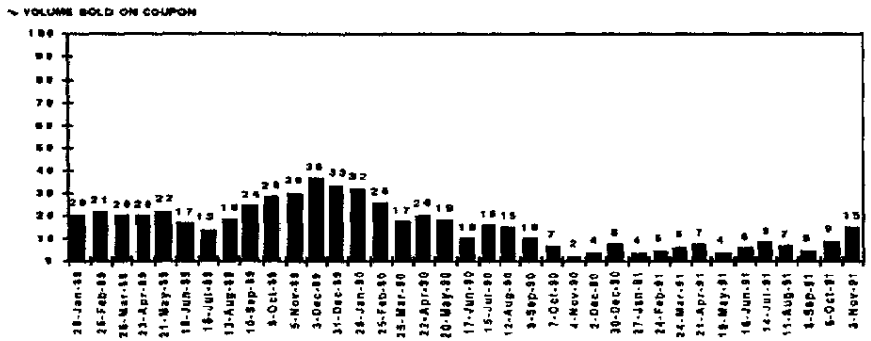
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

PHILIP MORRIS FULL MARGIN
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



TOTAL R J REYNOLDS FULL MARGIN
PERCENT OF VOLUME SOLD ON COUPON
SUPERMARKETS

BROWN & WILLIAMSON FULL MARGIN
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



AMERICAN FULL MARGIN
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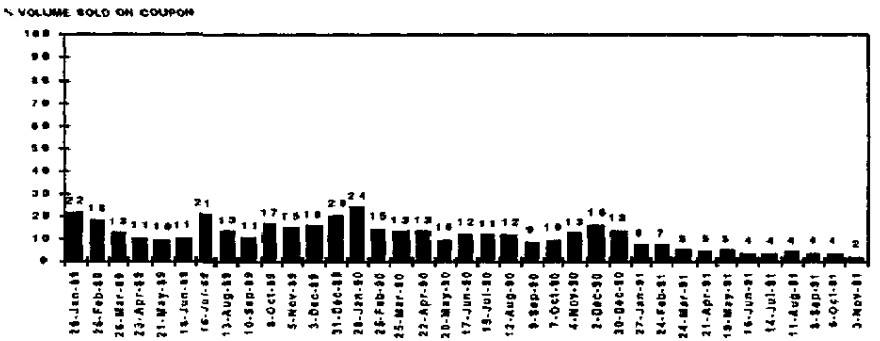

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LORILLARD FULL MARGIN
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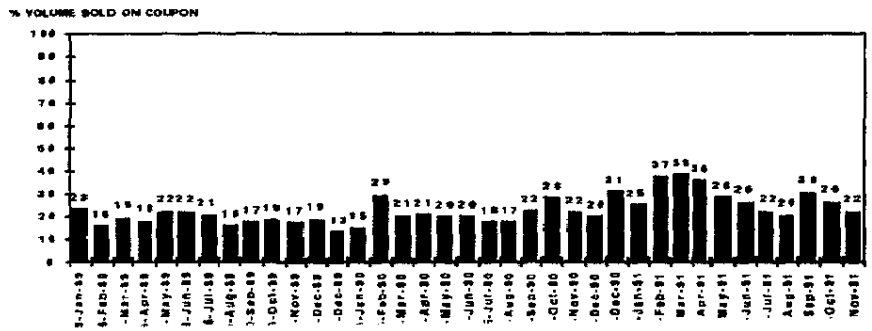

LIGGETT FULL MARGIN
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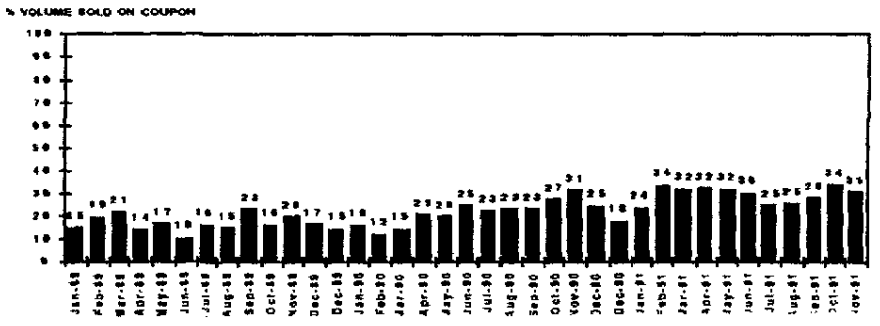

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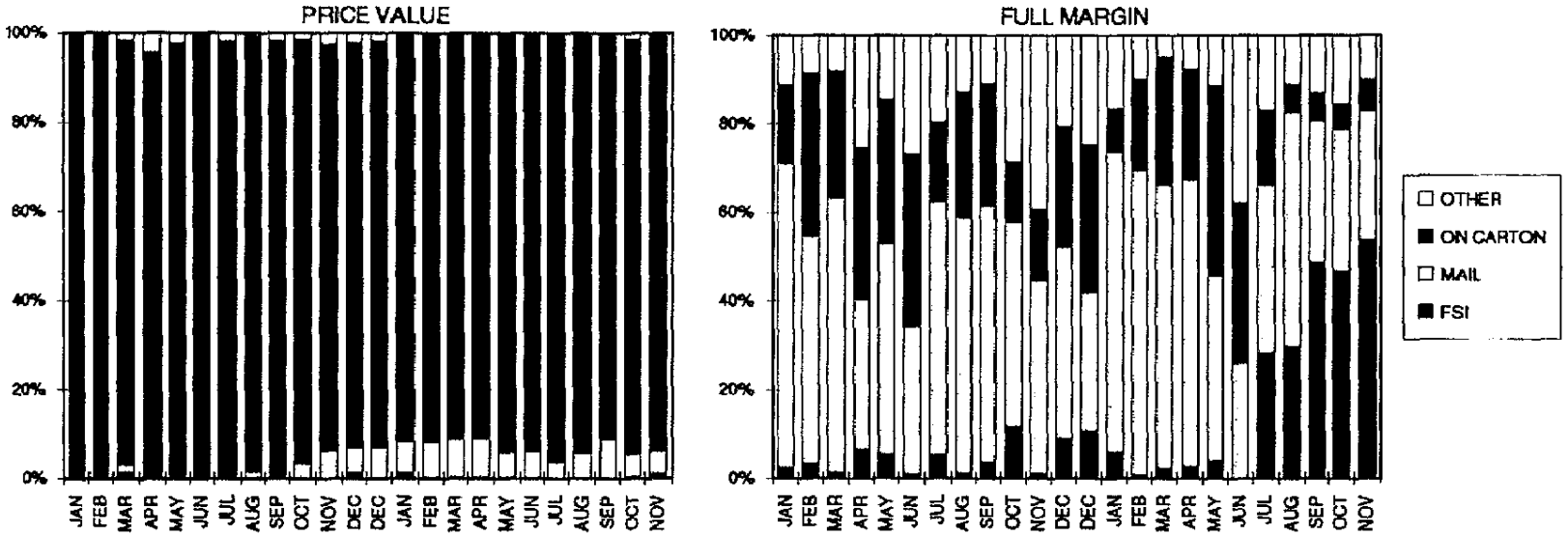
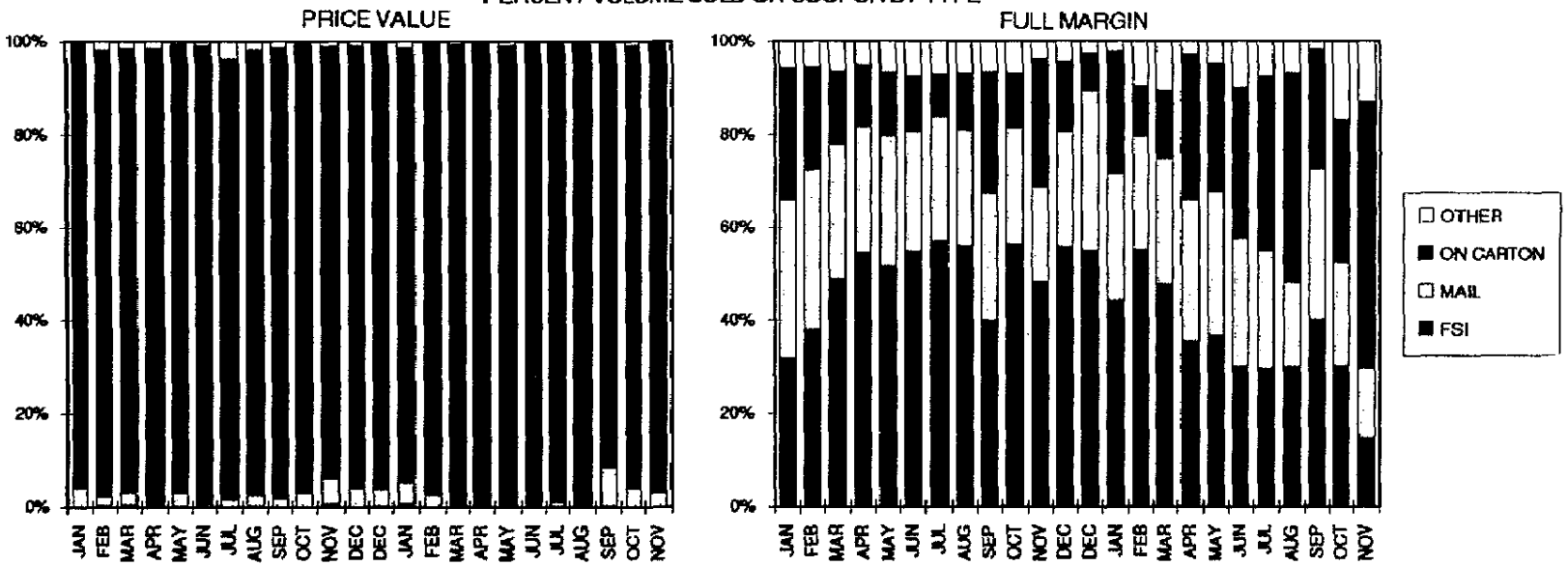
PERCENT VOLUME SOLD ON COUPON BY TYPE



R.J. REYNOLDS
PERCENT VOLUME SOLD ON COUPON BY TYPE



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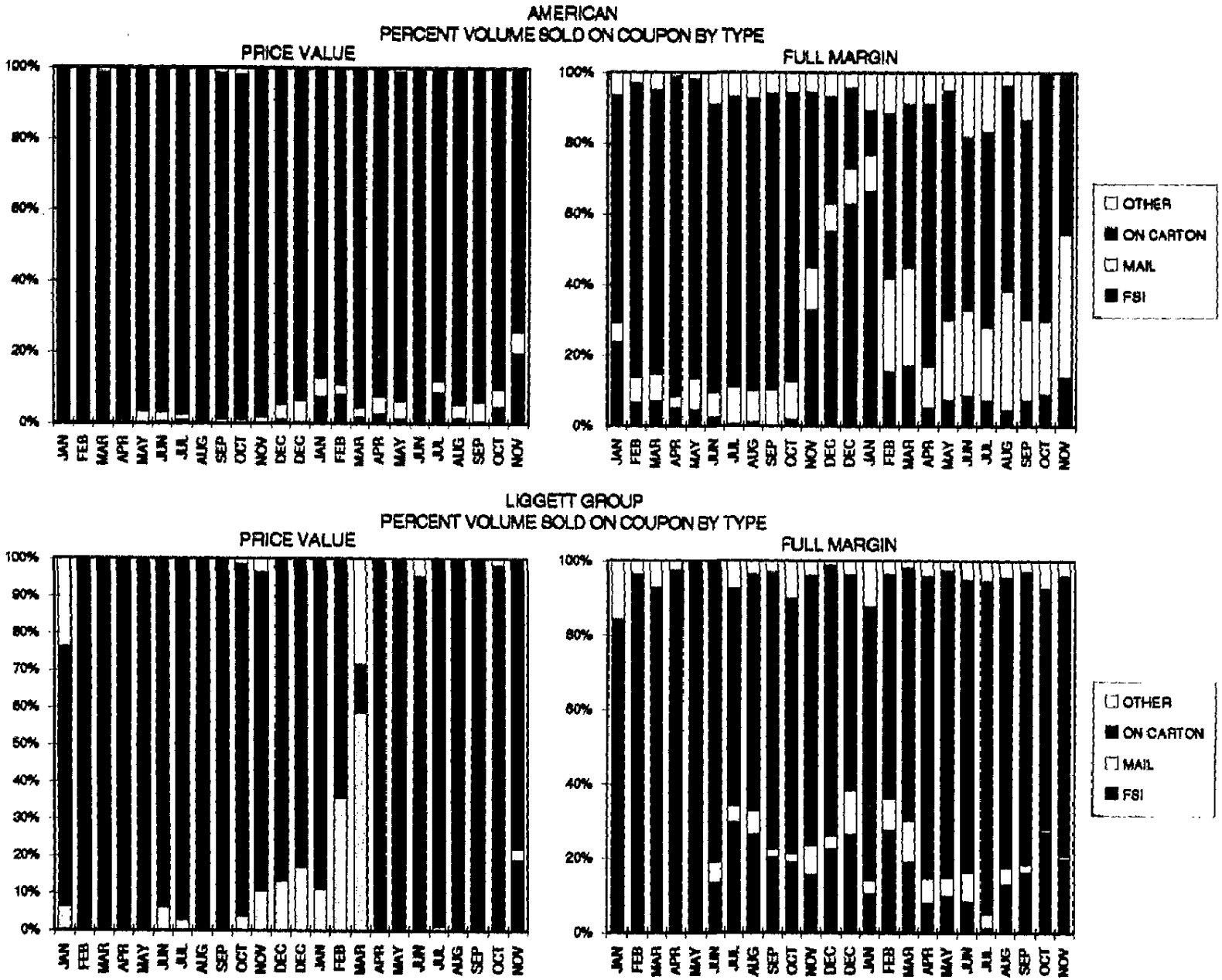

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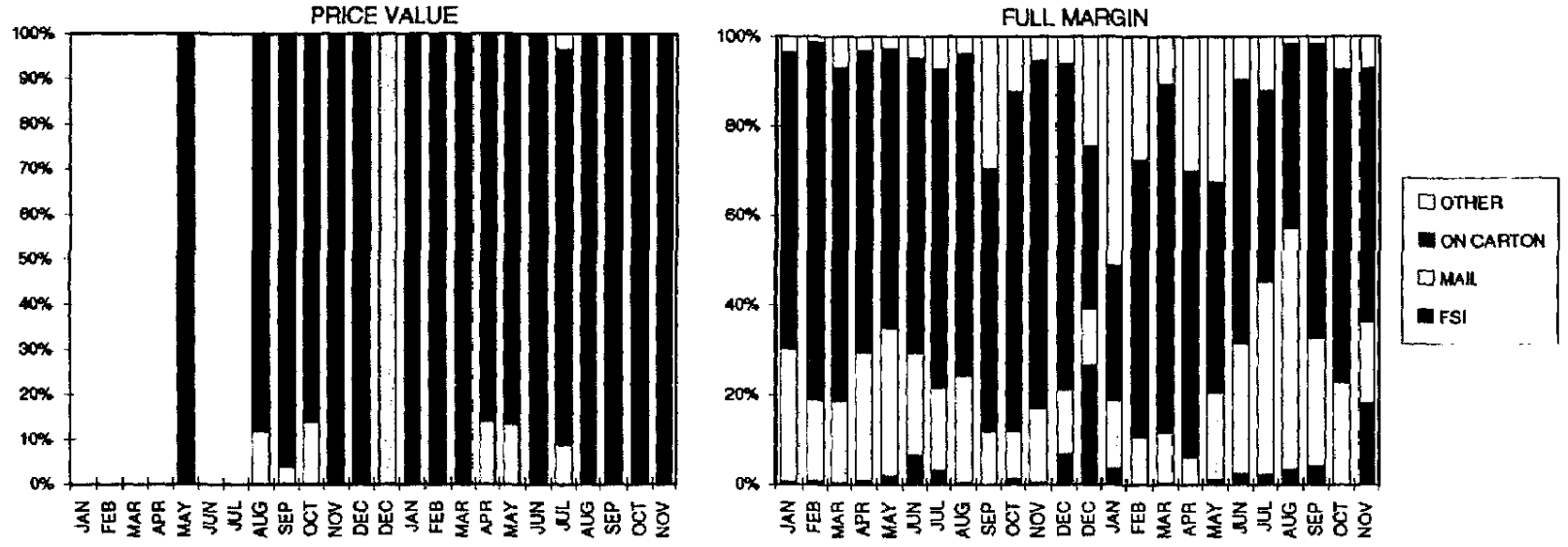
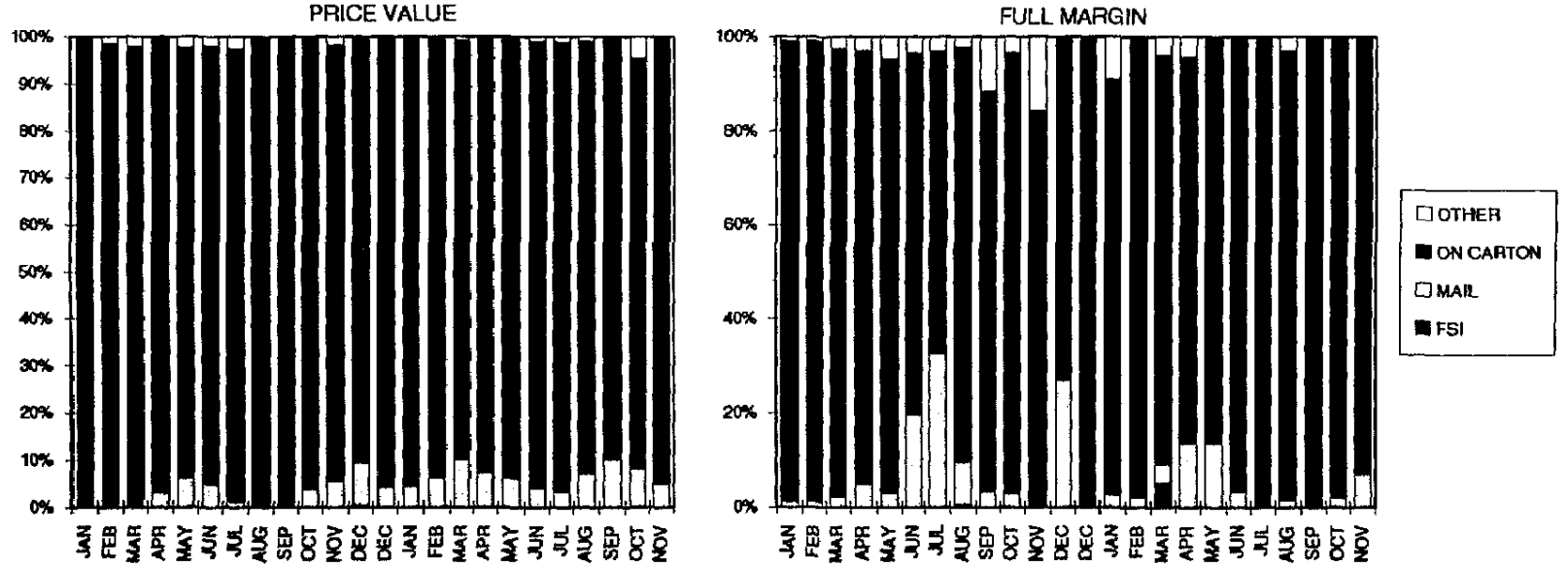
LORILLARD
PERCENT VOLUME SOLD ON COUPON BY TYPE



BROWN & WILLIAMSON
PERCENT VOLUME SOLD ON COUPON BY TYPE



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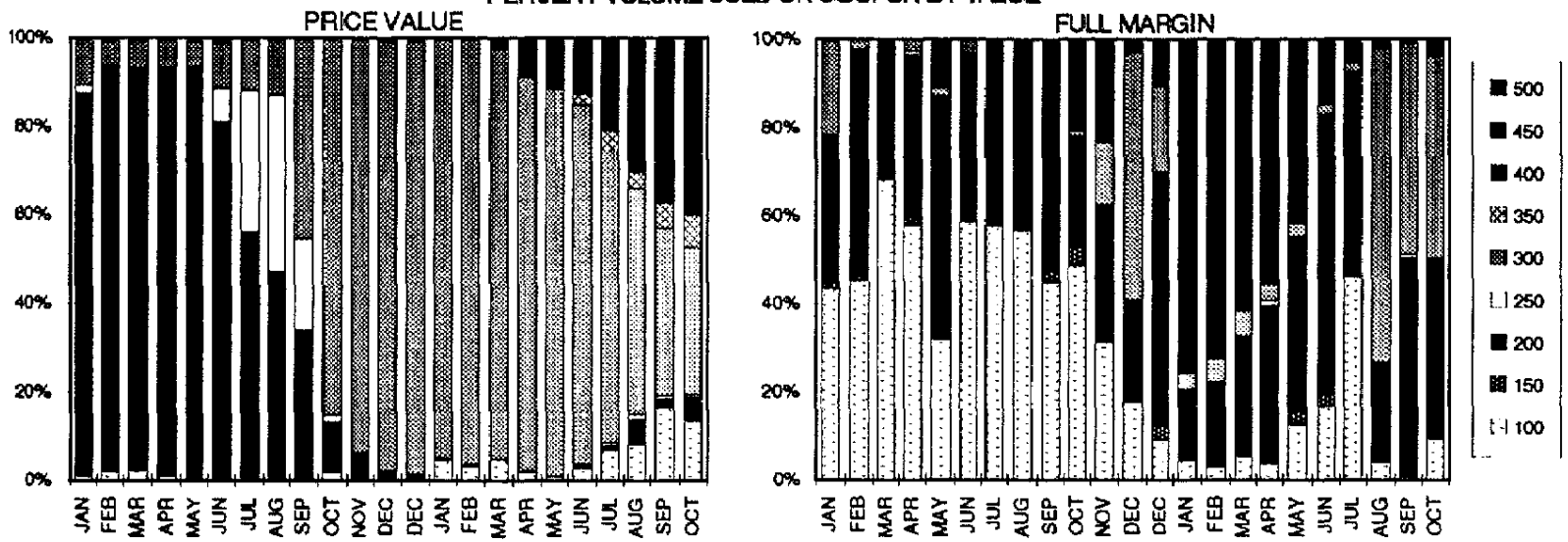
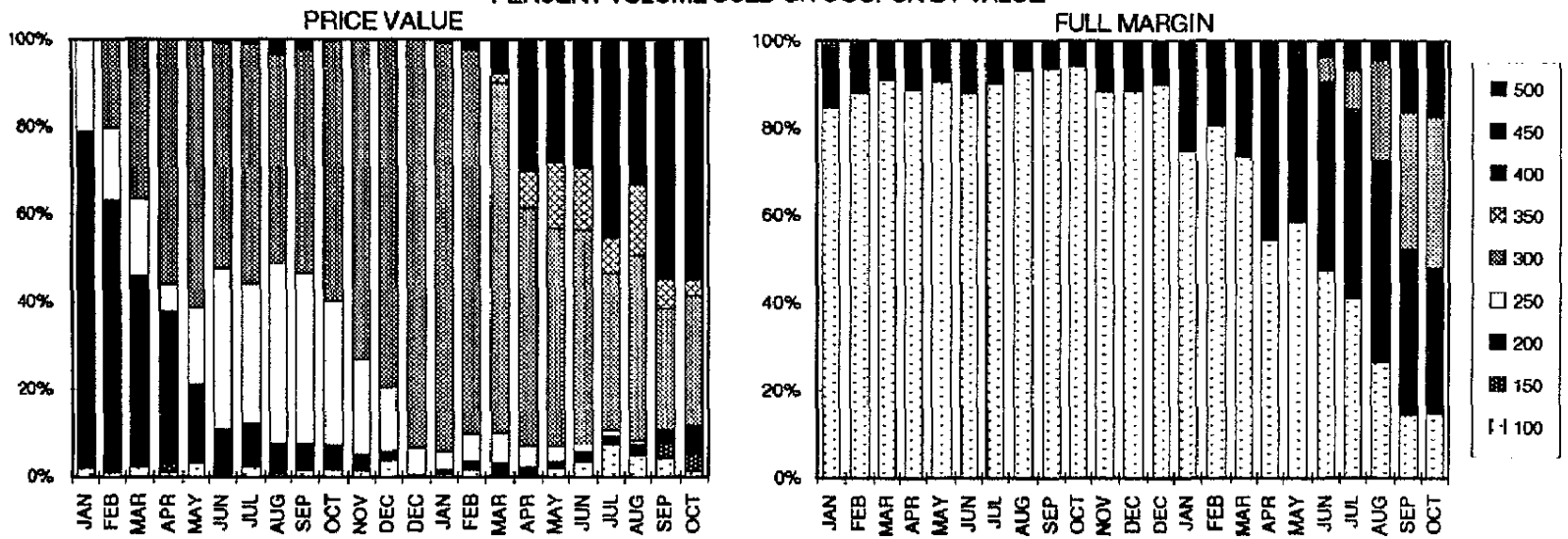
PHILIP MORRIS

PERCENT VOLUME SOLD ON COUPON BY VALUE



R.J. REYNOLDS

PERCENT VOLUME SOLD ON COUPON BY VALUE



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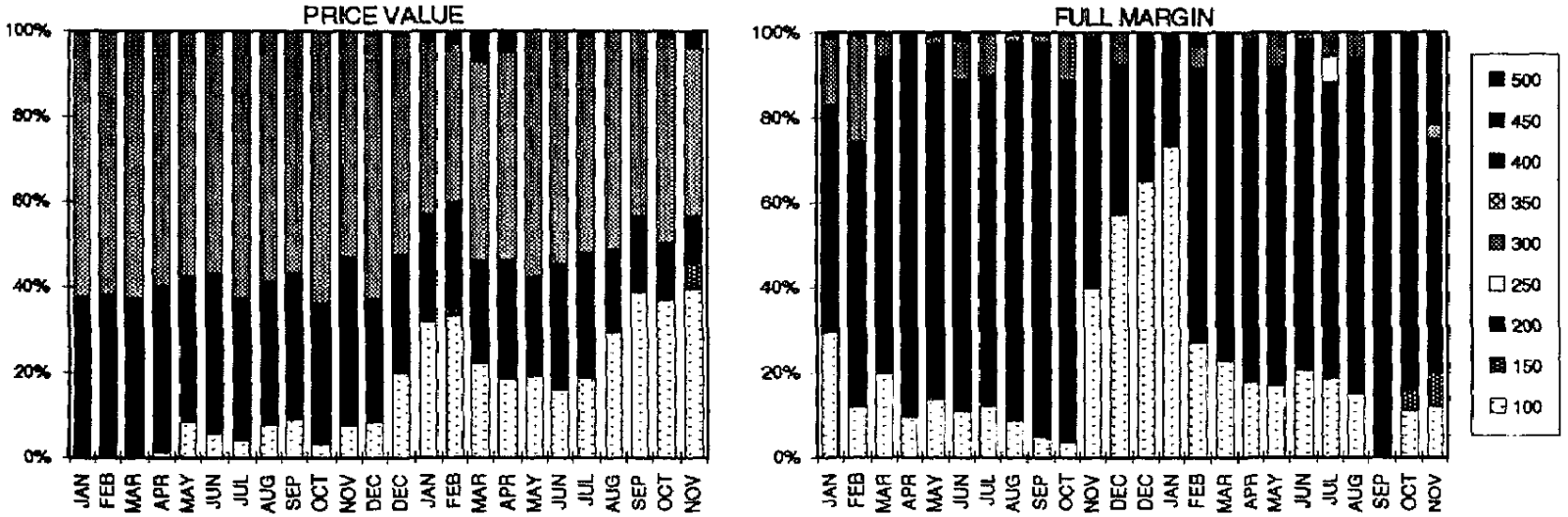
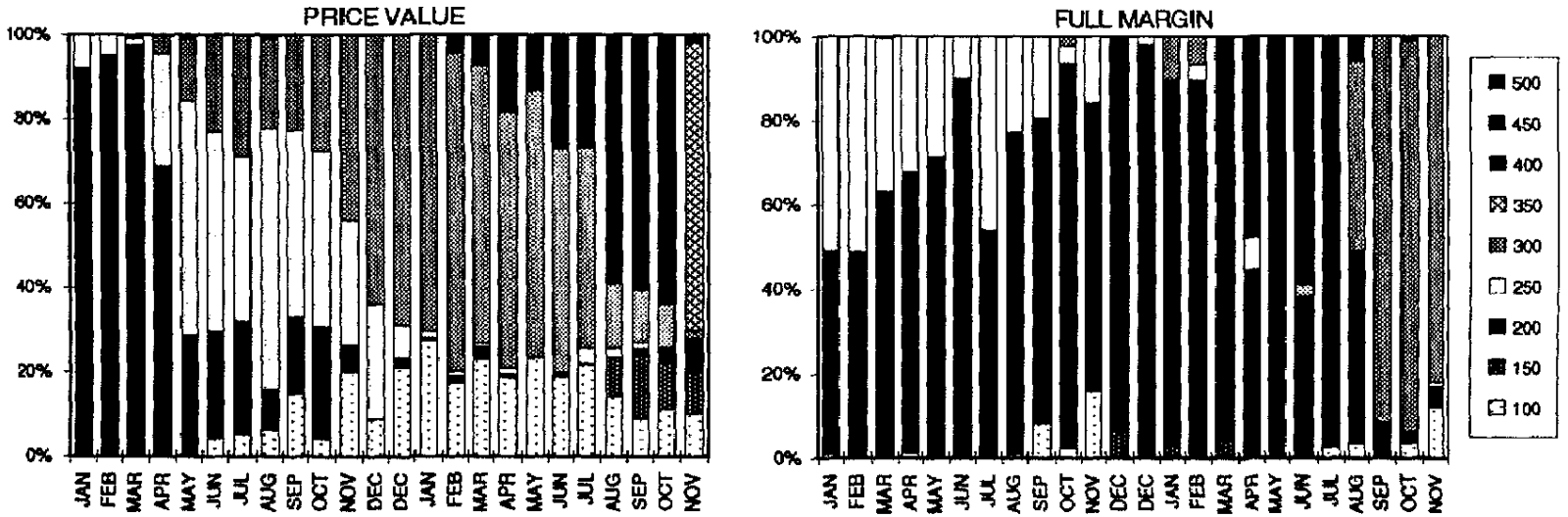
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

AMERICAN
PERCENT VOLUME SOLD ON COUPON BY VALUE



BROWN & WILLIAMSON
PERCENT VOLUME SOLD ON COUPON BY VALUE



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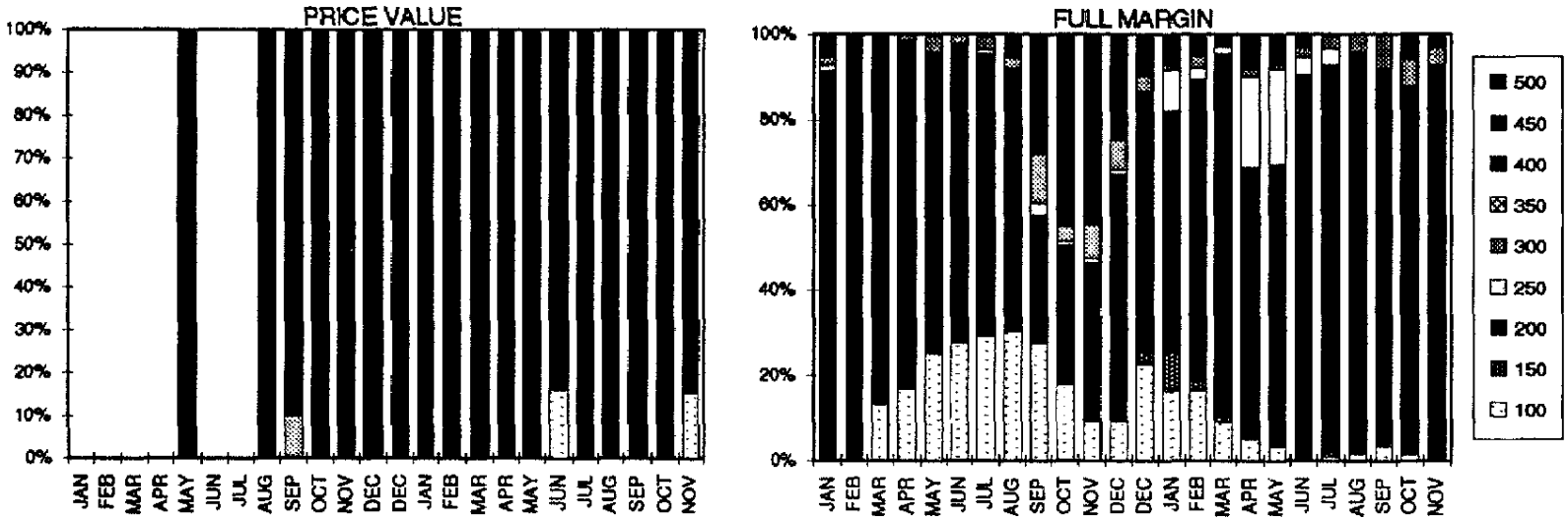
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

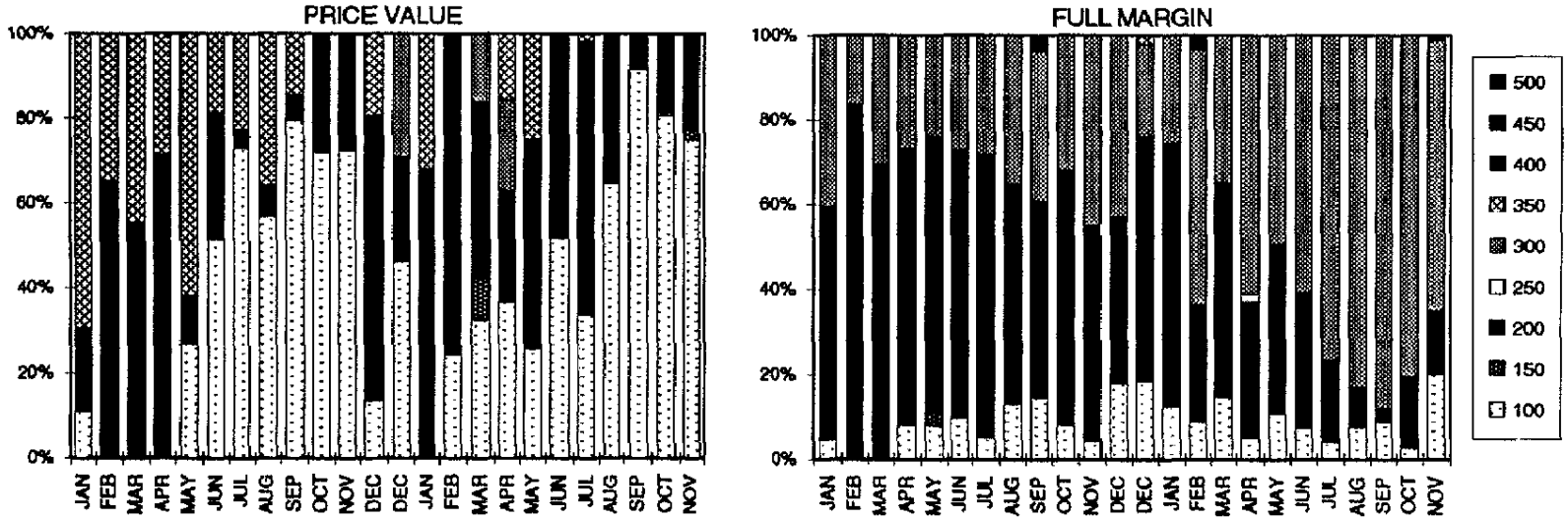
LORILLARD

PERCENT VOLUME SOLD ON COUPON BY VALUE



LIGGETT GROUP

PERCENT VOLUME SOLD ON COUPON BY VALUE



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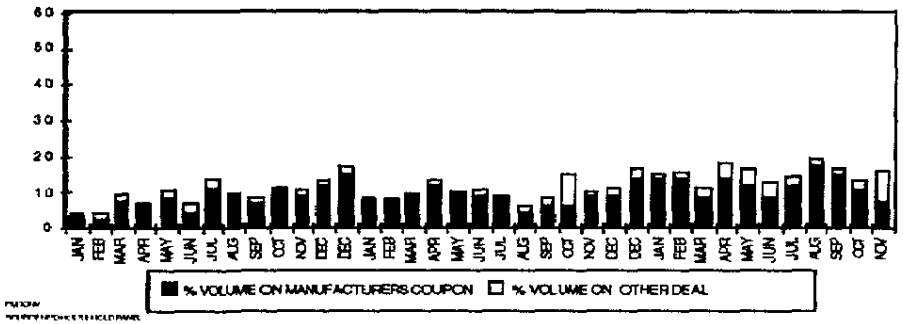
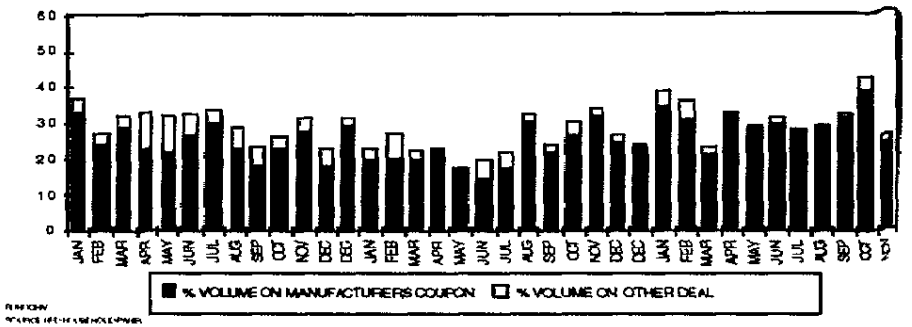
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

PHILIP MORRIS
DEAL ACTIVITY
CONVENIENCE



R.J. REYNOLDS
DEAL ACTIVITY
CONVENIENCE



BROWN & WILLIAMSON
DEAL ACTIVITY
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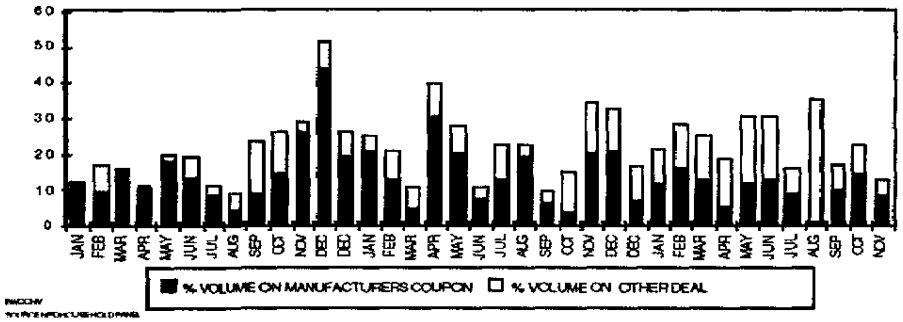
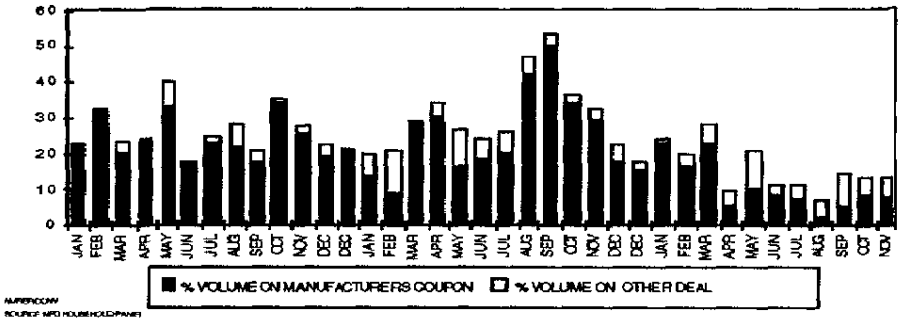


AMERICAN BRANDS
DEAL ACTIVITY
CONVENIENCE



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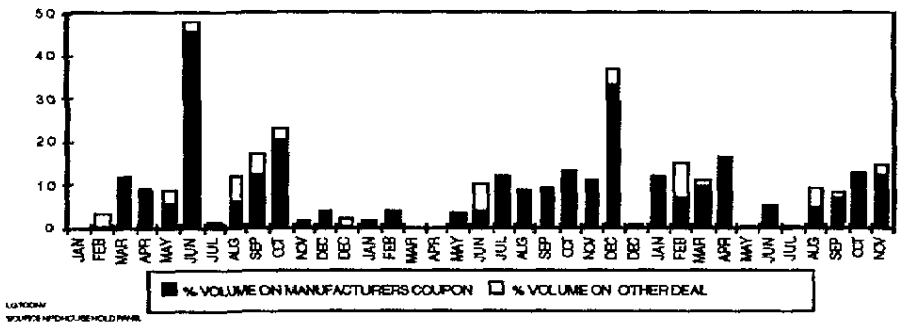
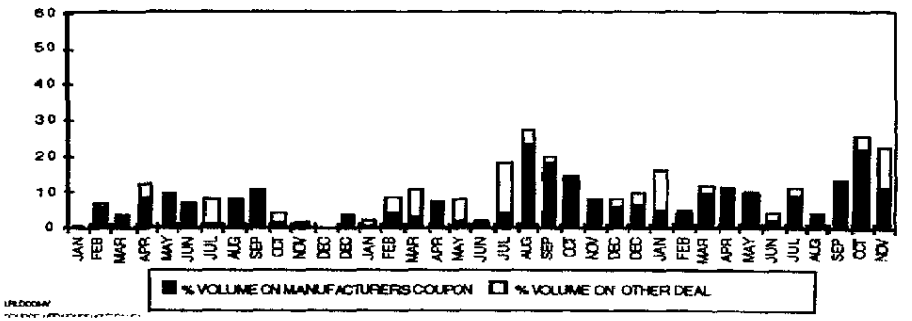
LIGGETT
DEAL ACTIVITY
CONVENIENCE



LORILLARD
DEAL ACTIVITY
CONVENIENCE



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

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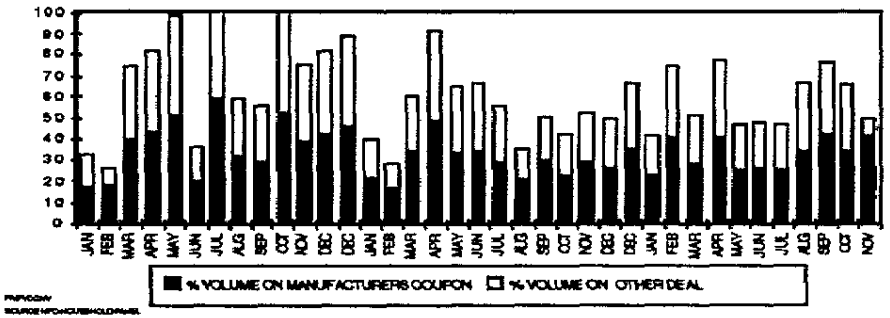
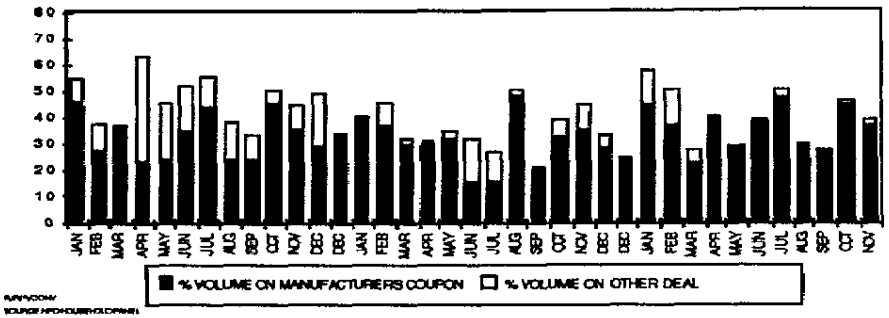
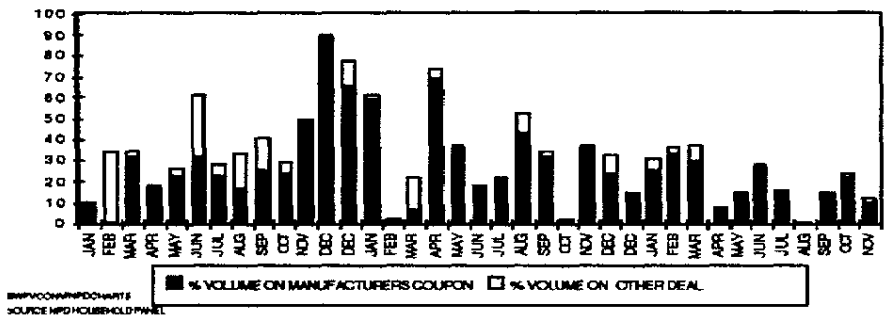
PHILIP MORRIS PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



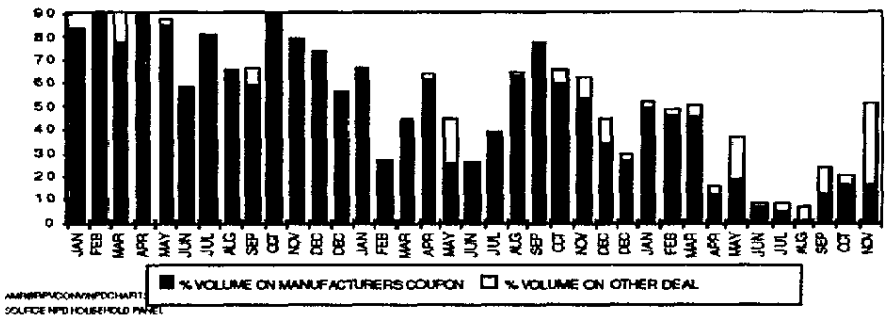
RJ REYNOLDS PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



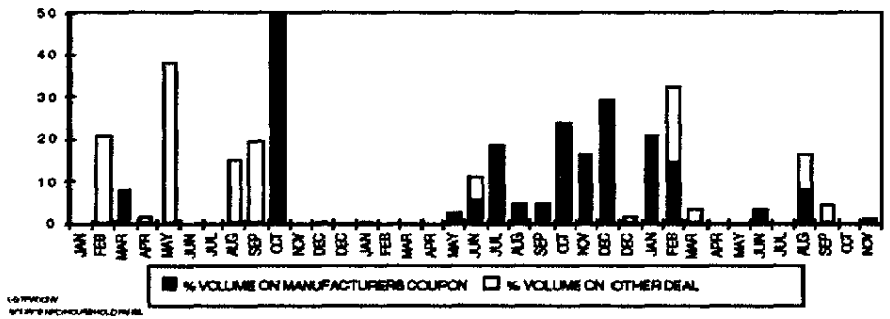
BROWN & WILLIAMSON PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



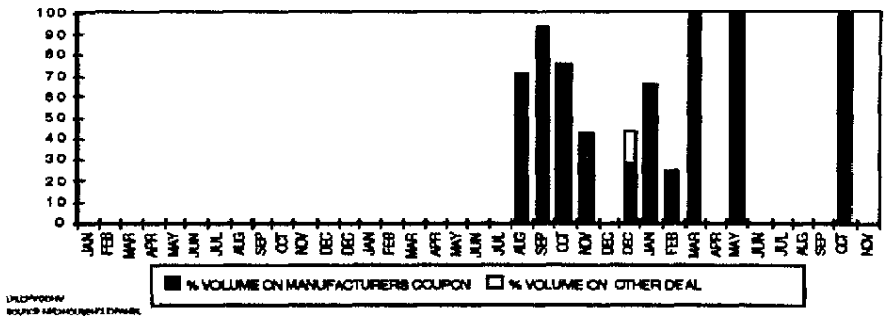
AMERICAN BRANDS PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



LIGGETT PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



LORILLARD PRICE VALUE
DEAL ACTIVITY
CONVENIENCE



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

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PHILIP MORRIS FULL MARGIN
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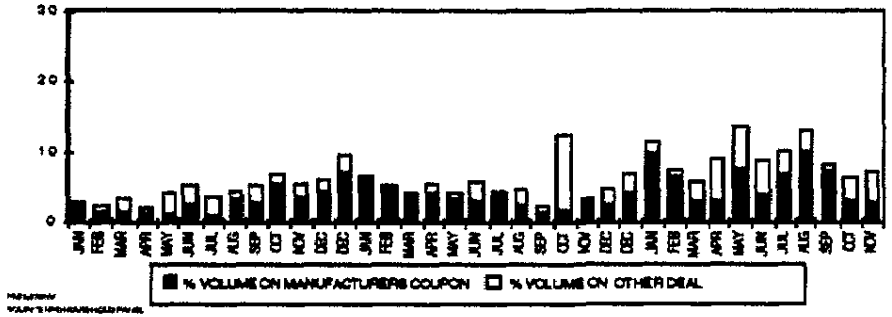

RJ REYNOLDS FULL MARGIN
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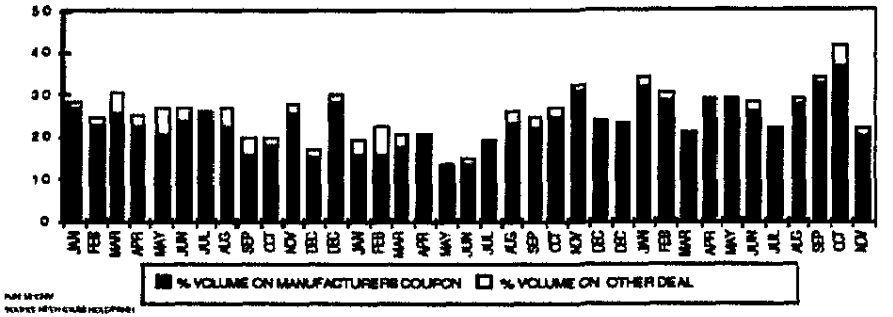

BROWN & WILLIAMSON FULL MARGIN
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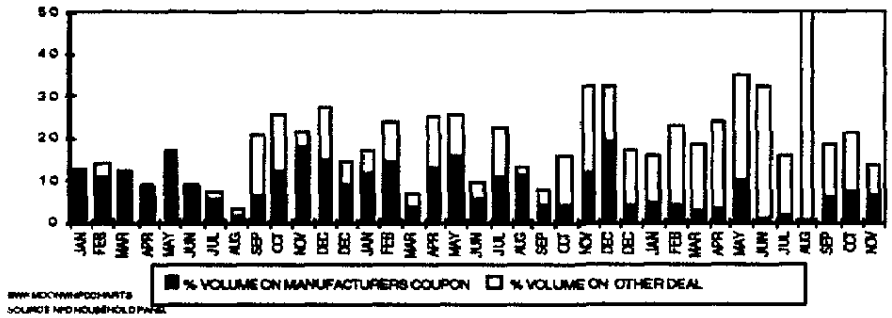

AMERICAN BRANDS FULL MARGIN
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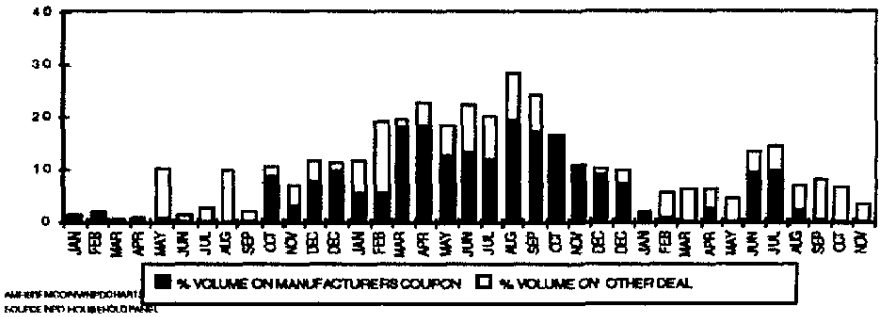

LIGGETT FULL MARGIN
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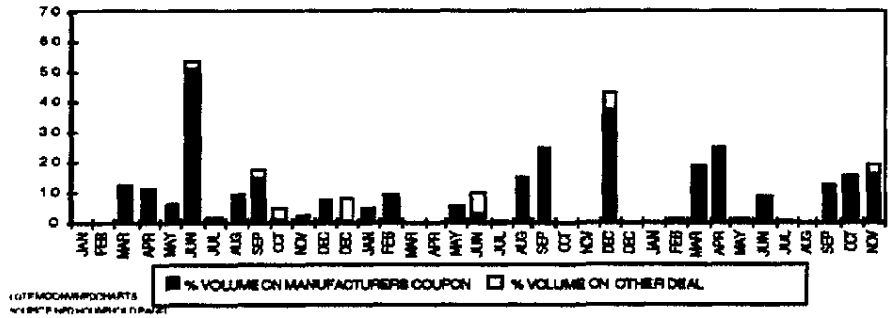

LORILLARD FULL MARGIN
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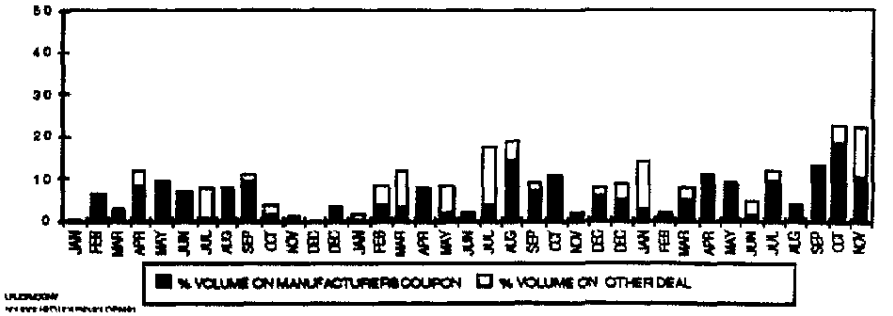
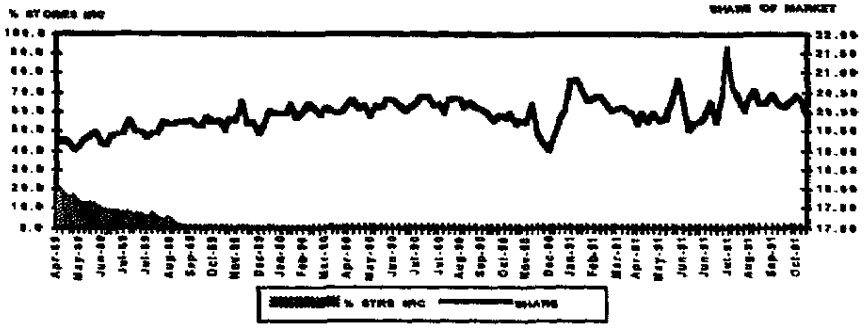
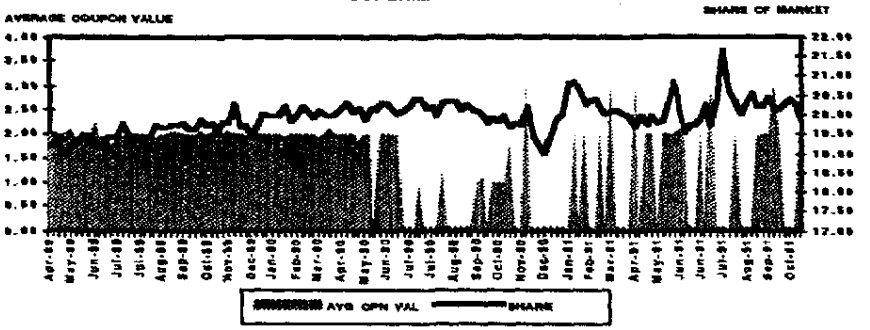


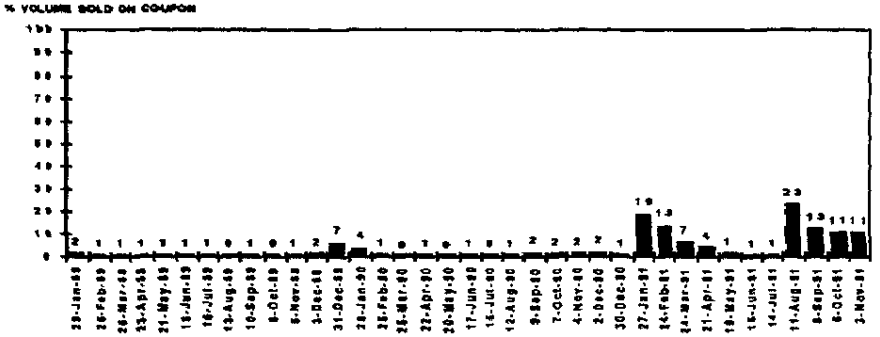
MARLBORO
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



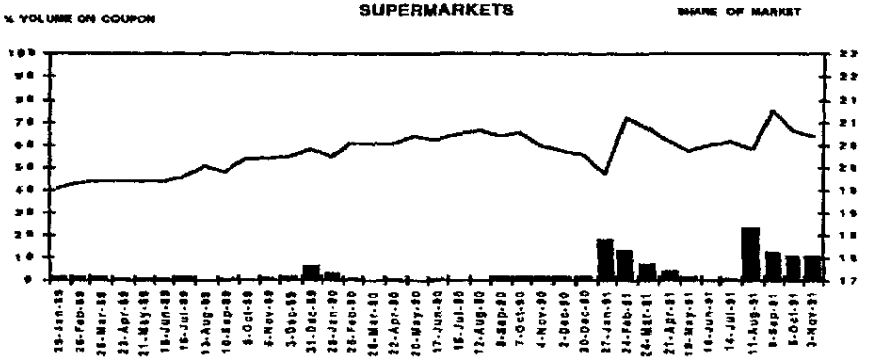
MARLBORO
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



MARLBORO
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



MARLBORO
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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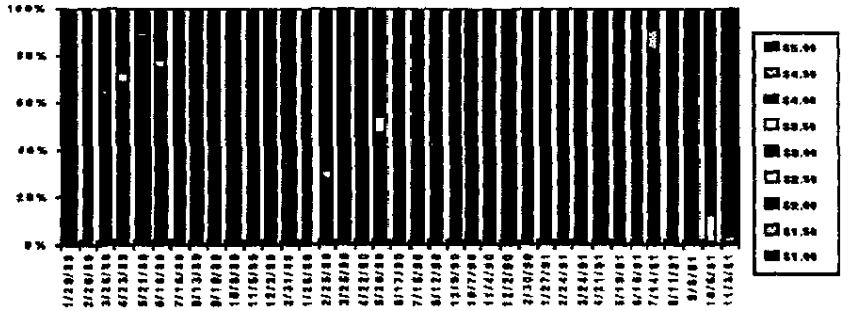
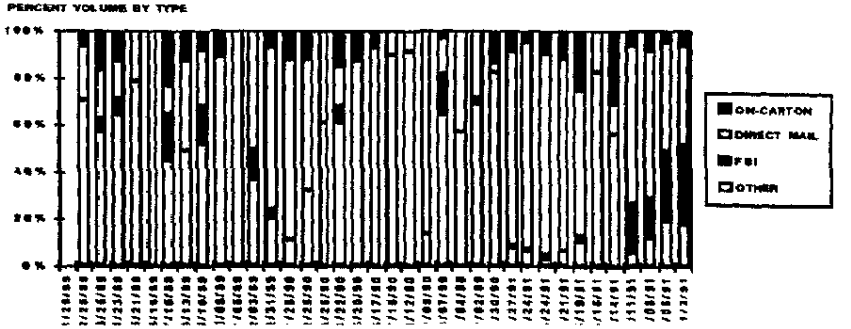
MARLBORO
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

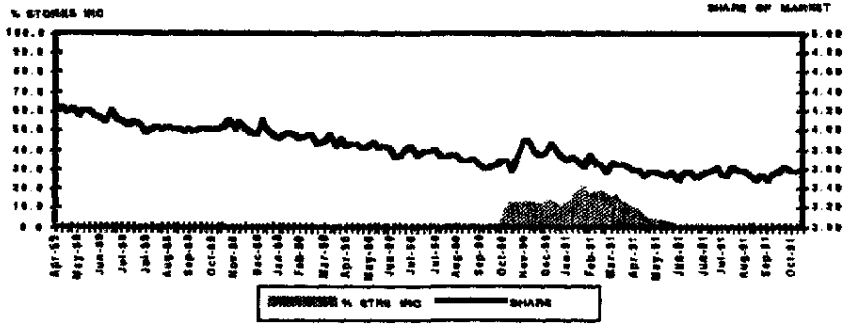


MARLBORO
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

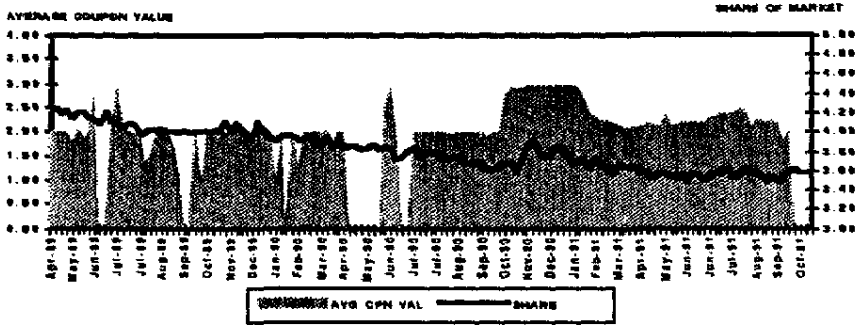


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

BENSON & HEDGES
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



BENSON & HEDGES
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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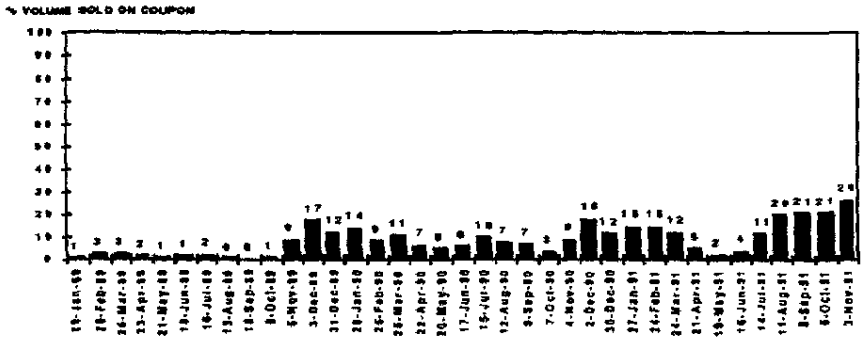
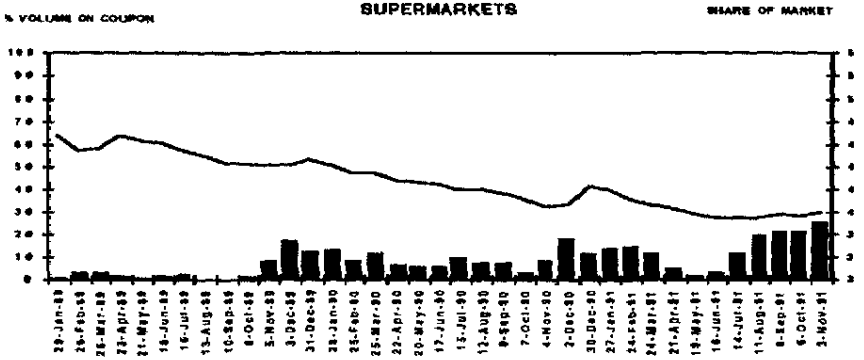
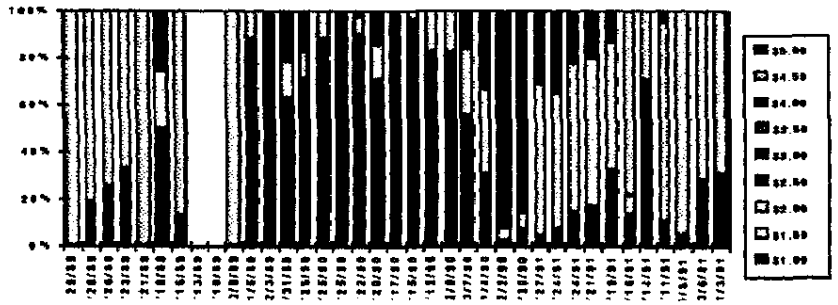
BENSON & HEDGES
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



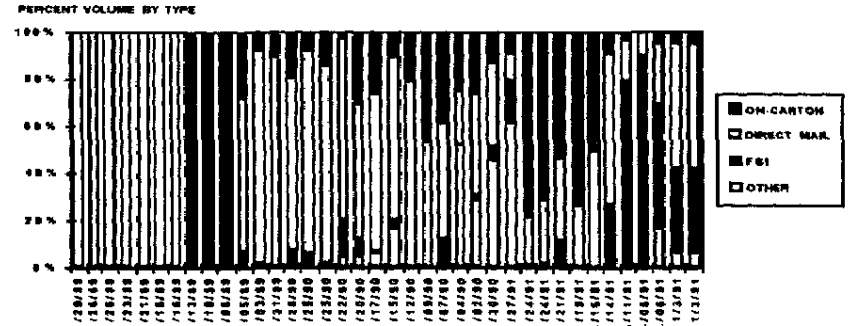
BENSON AND HEDGES
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



BENSON & HEDGES
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

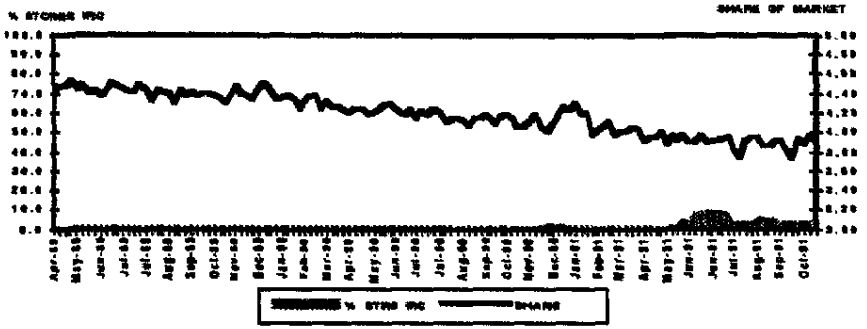


BENSON & HEDGES
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

MERIT
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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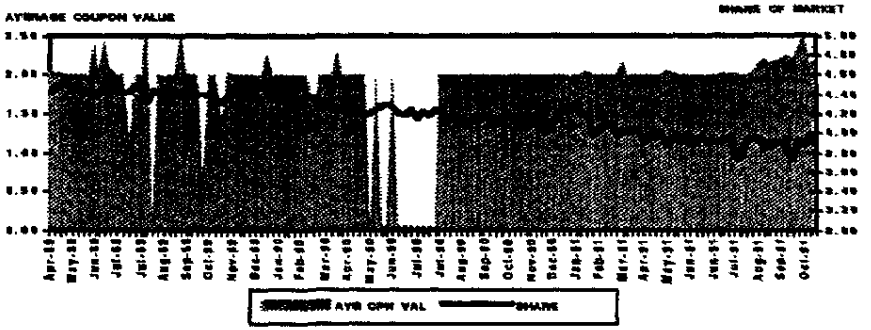
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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MERIT
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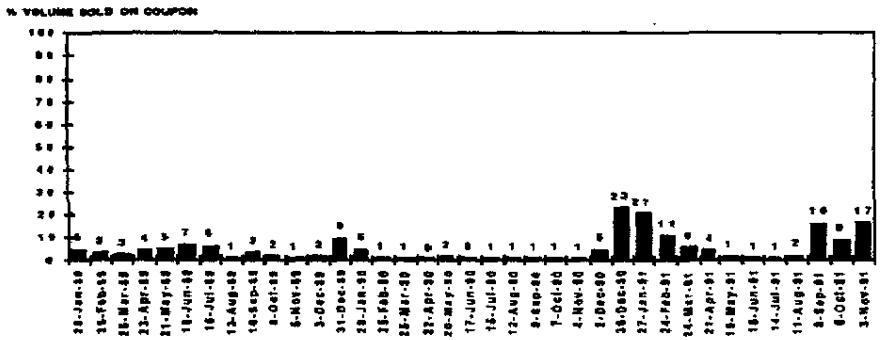
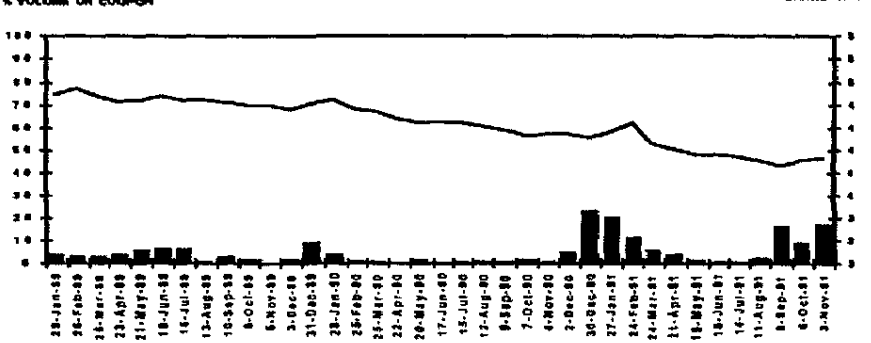
SUPERMARKETS



MERIT
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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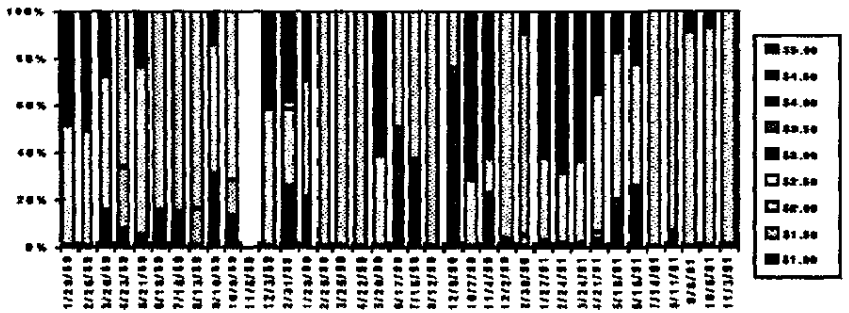
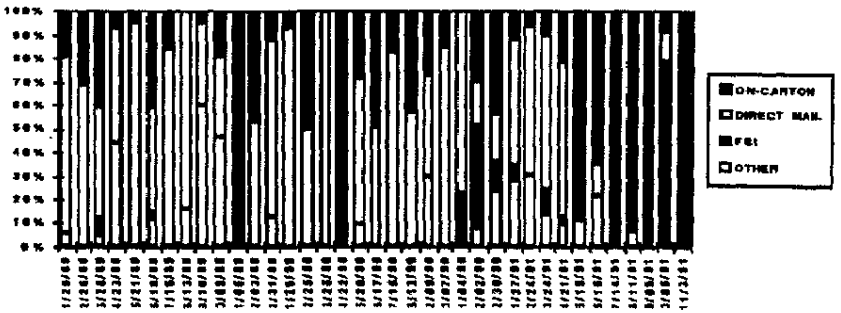
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

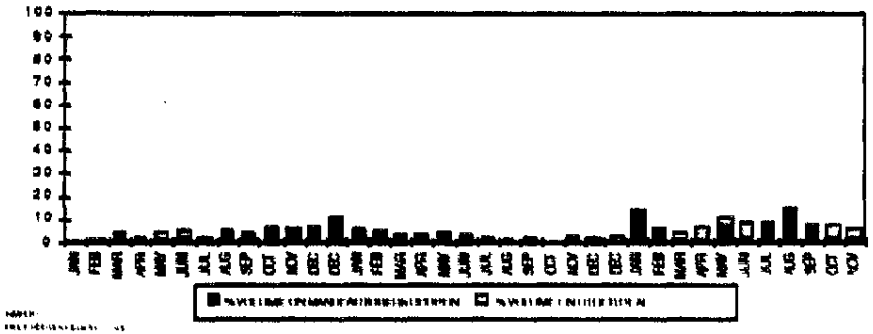


MERIT
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

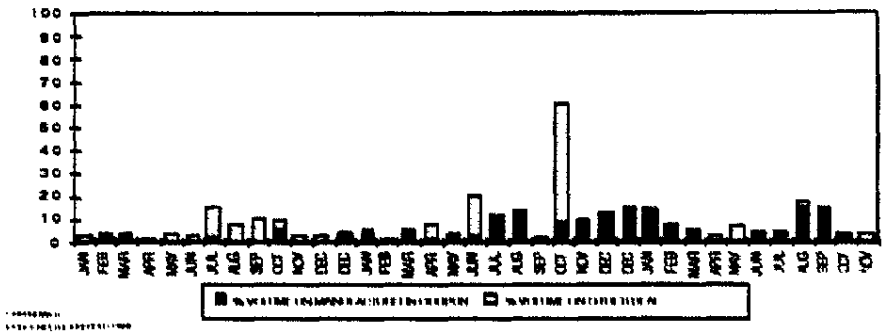


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

MARLBORO
DEAL ACTIVITY
CONVENIENCE



B+H W/O D-NC
DEAL ACTIVITY
CONVENIENCE



MERIT
DEAL ACTIVITY
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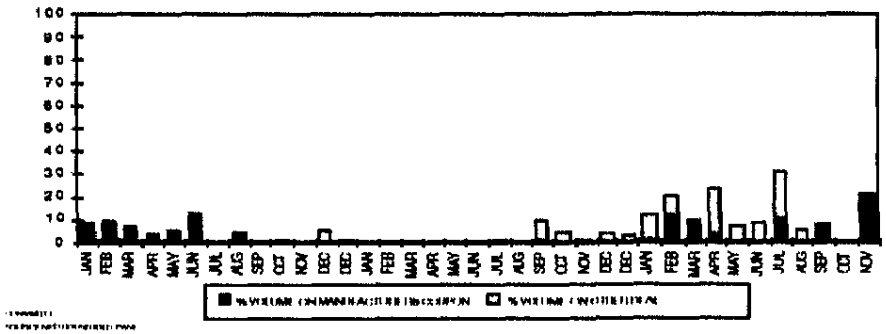

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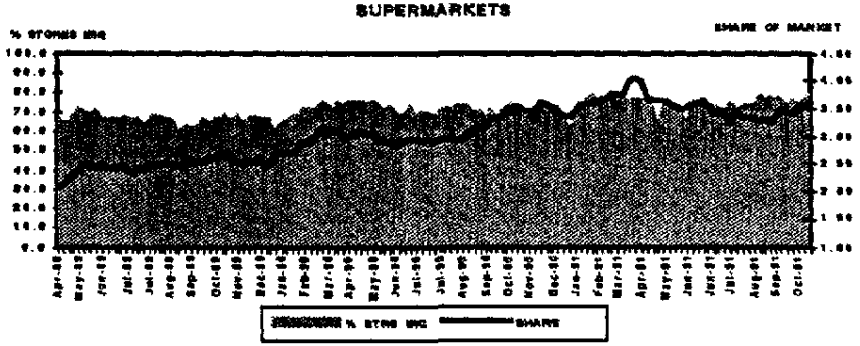
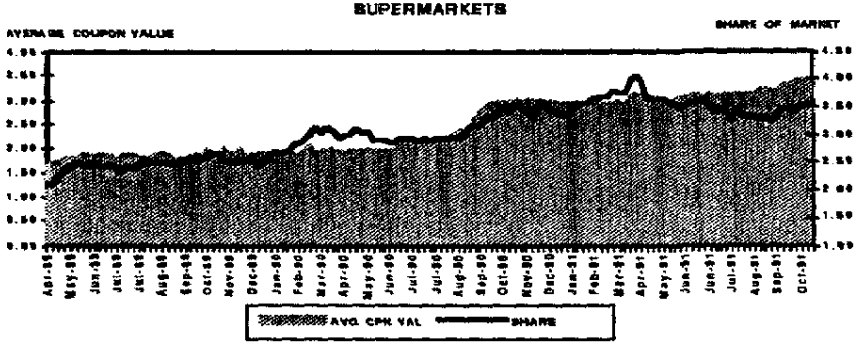
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

CAMBRIDGE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS

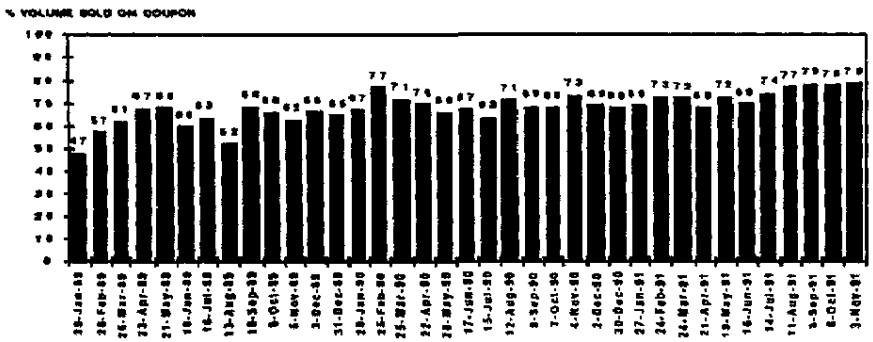


CAMBRIDGE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS

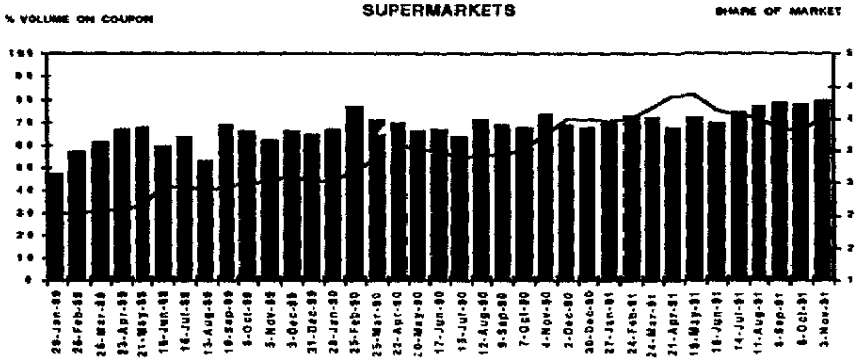


20731322S7

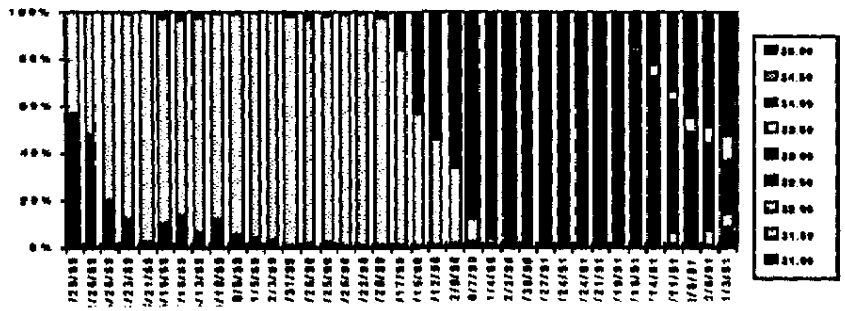
CAMBRIDGE
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



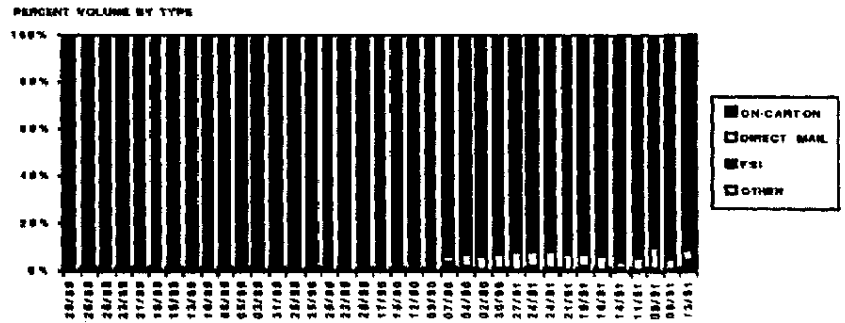
CAMBRIDGE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



CAMBRIDGE
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

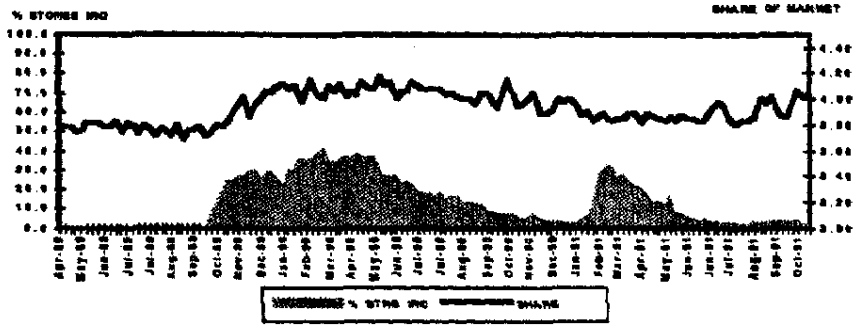


CAMBRIDGE
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

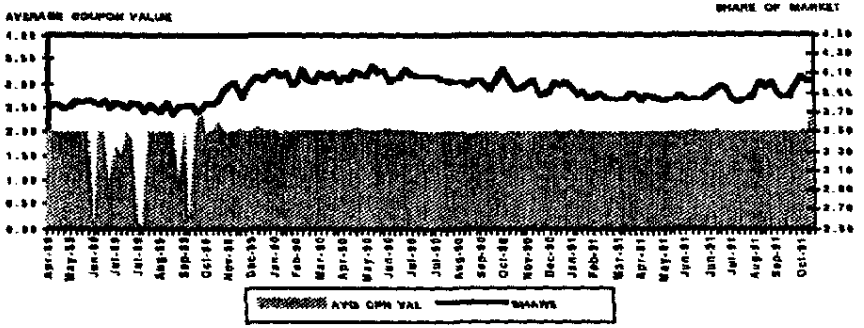


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

VIRGINIA SLIMS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL U.S.: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



VIRGINIA SLIMS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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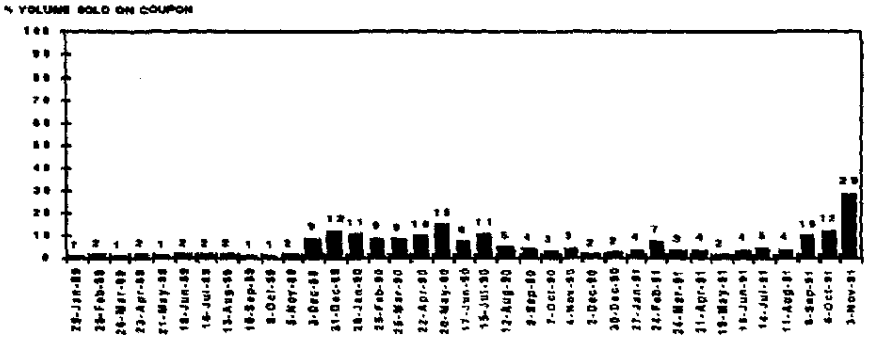
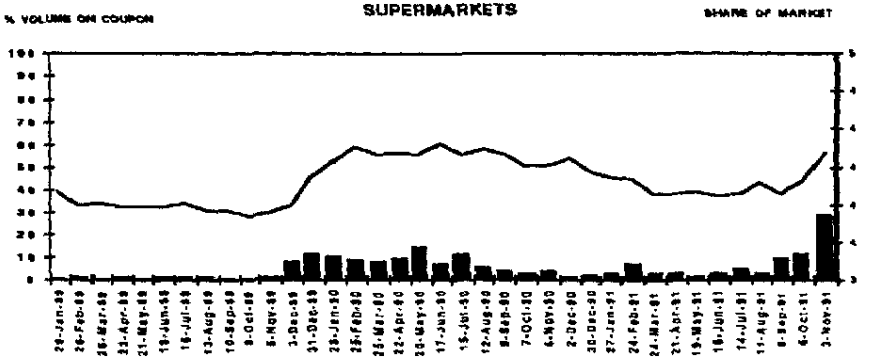
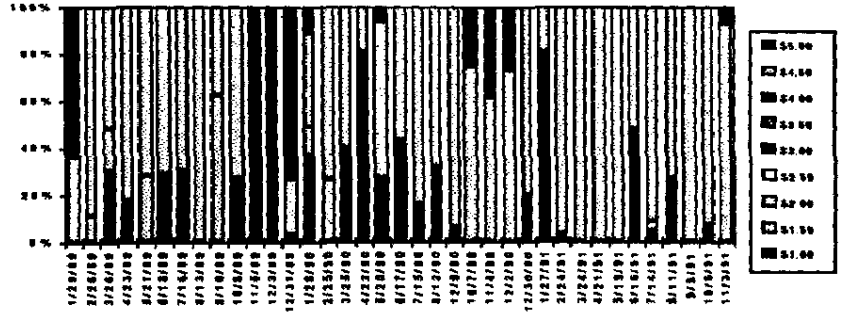
VIRGINIA SLIMS
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



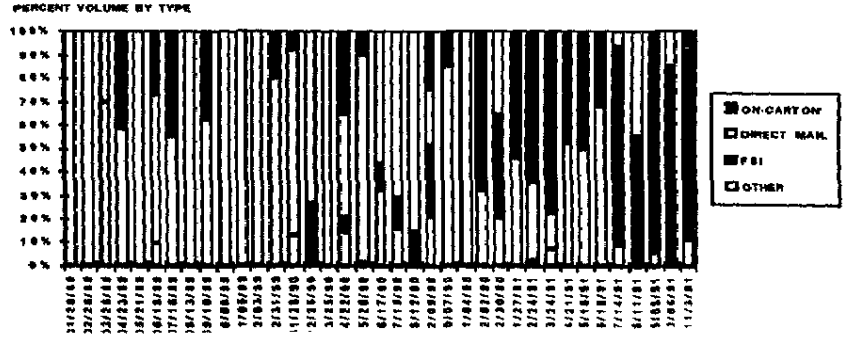
VIRGINIA SLIMS
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



VIRGINIA SLIMS
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

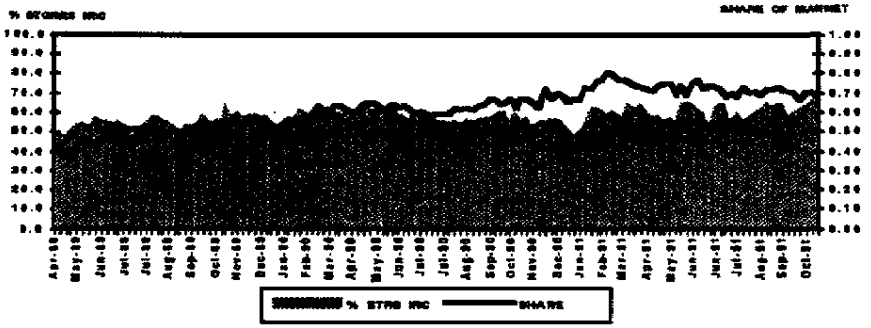


VIRGINIA SLIMS
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

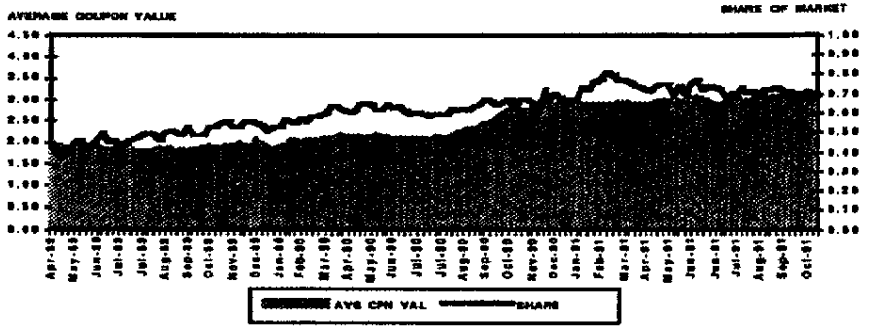


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

ALPINE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



ALPINE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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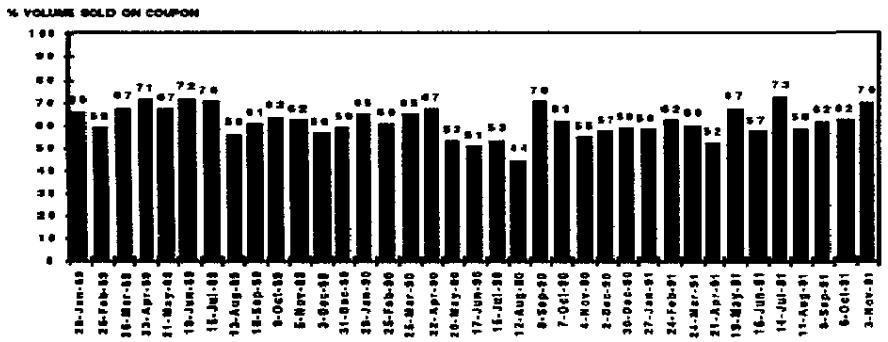
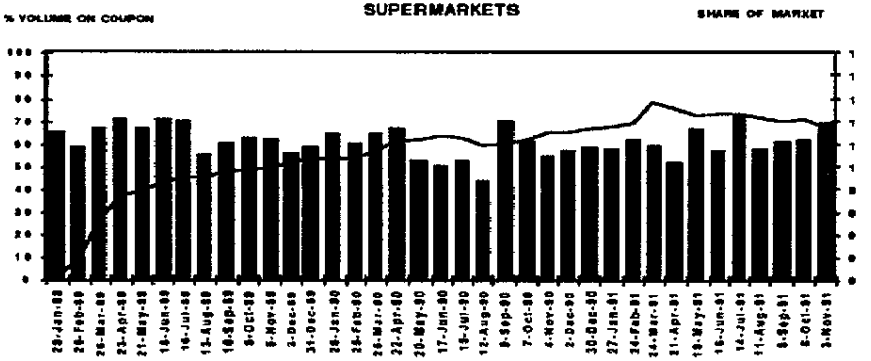
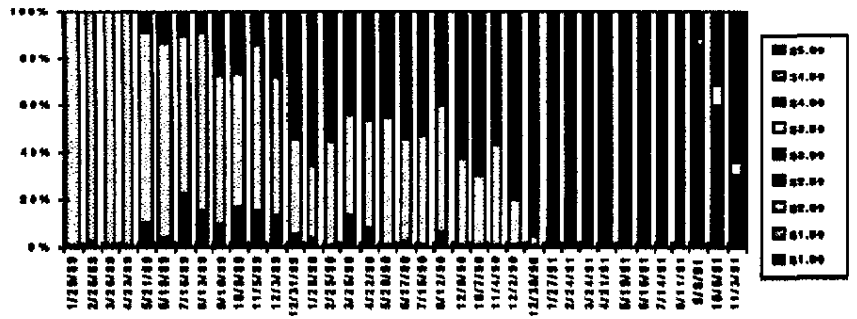
ALPINE
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



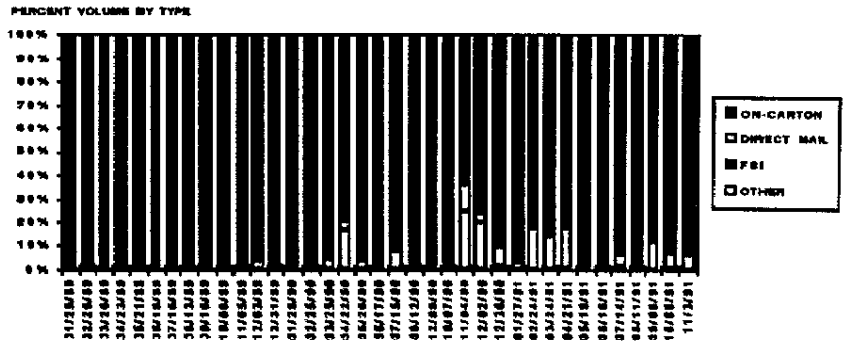
ALPINE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



ALPINE
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

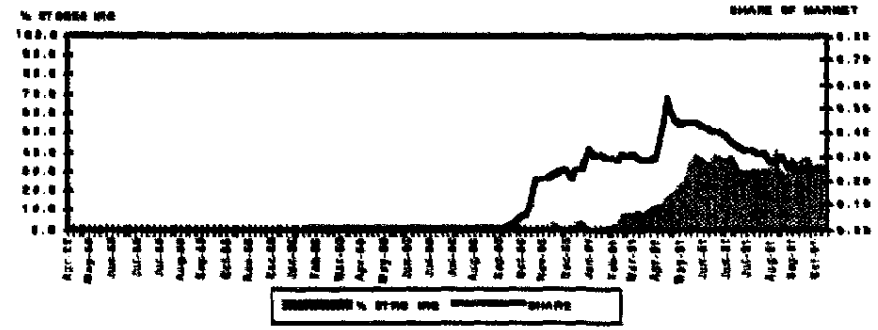


ALPINE
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

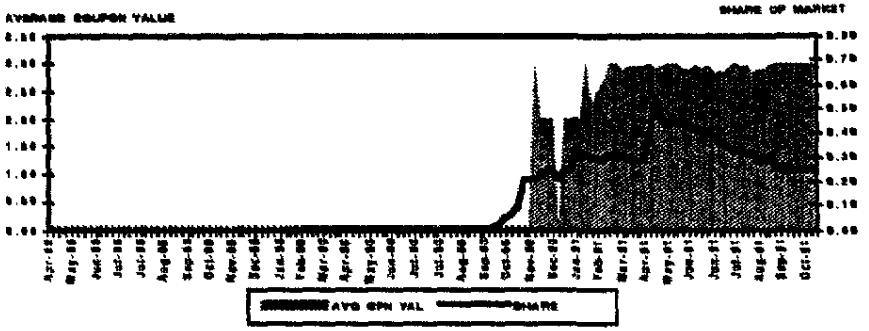


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

BUCKS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS

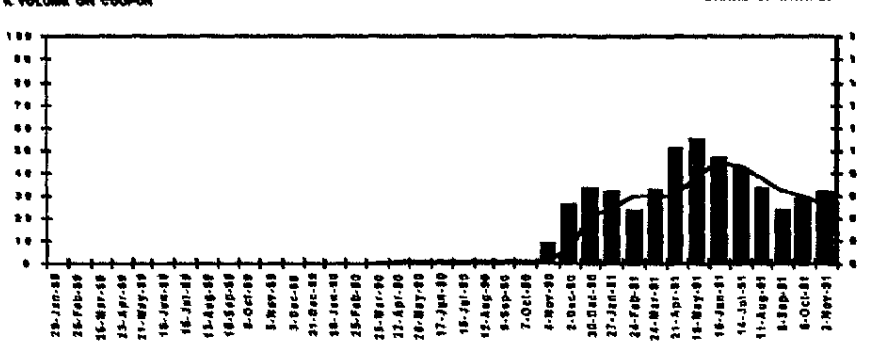


BUCKS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



BUCKS
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS

BUCKS
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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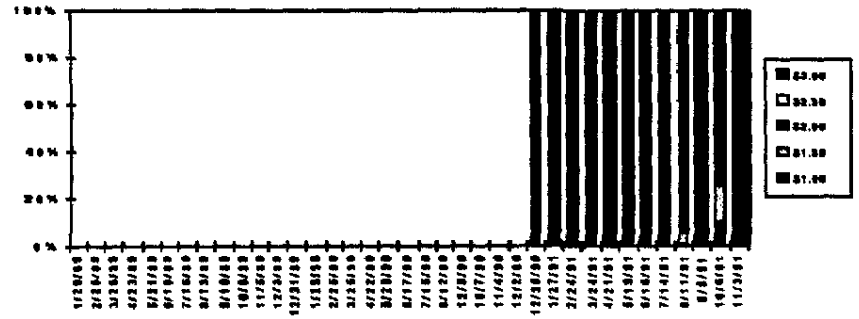
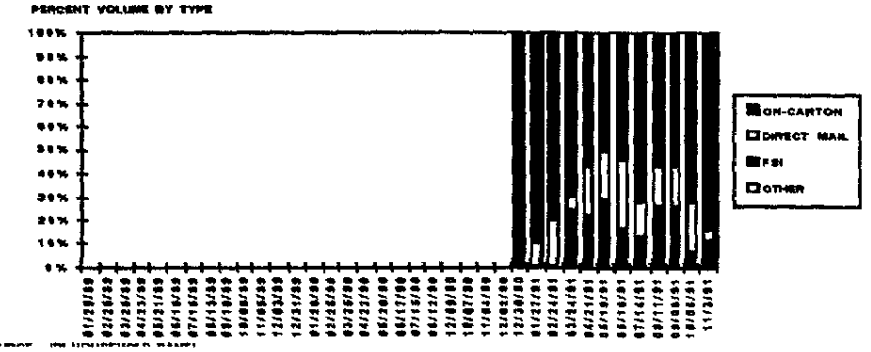
BUCKS
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

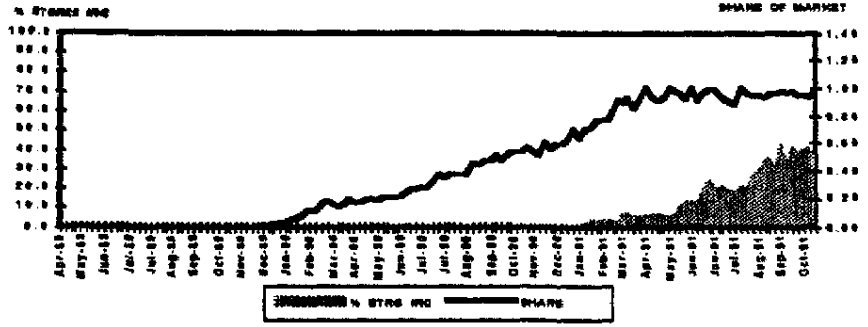


BUCKS
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

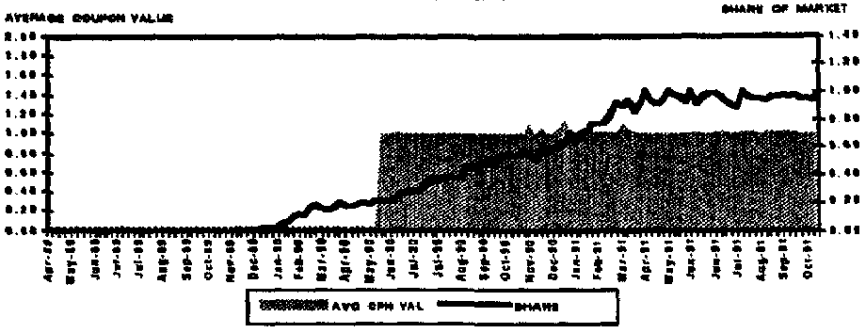


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

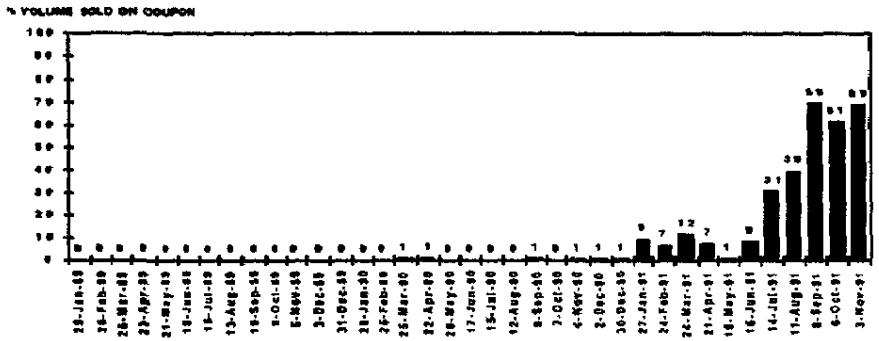
BRISTOL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



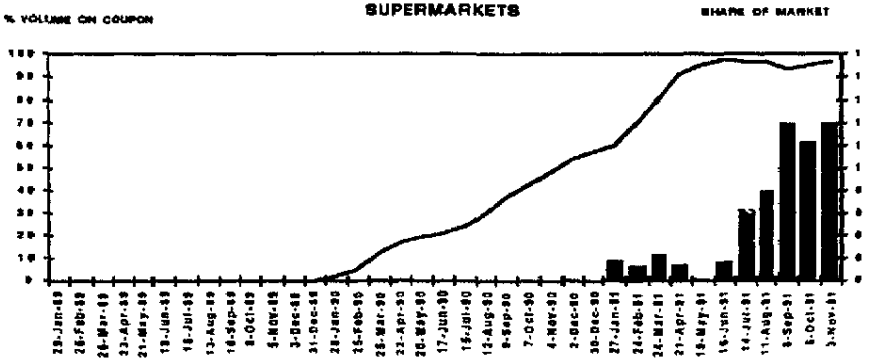
BRISTOL
IN-STORE PROMOTIONAL ACTIVITY
WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



BRISTOL
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



BRISTOL
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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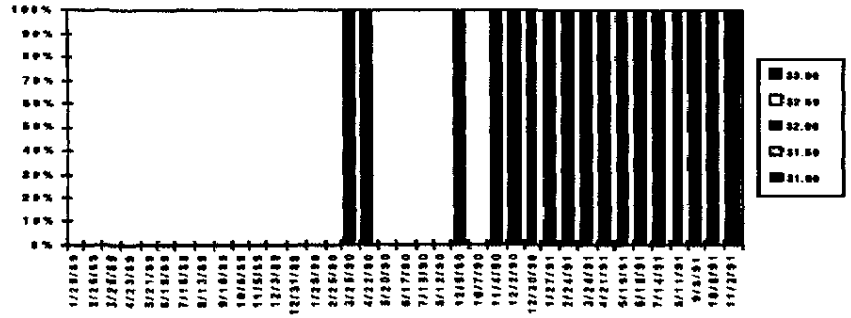
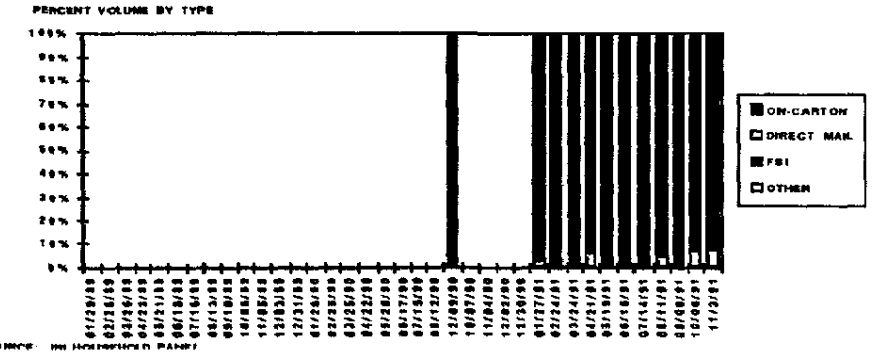
BRISTOL
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

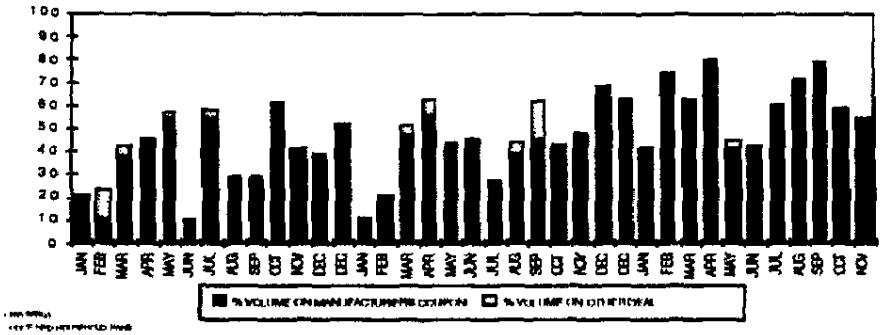


BRISTOL
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

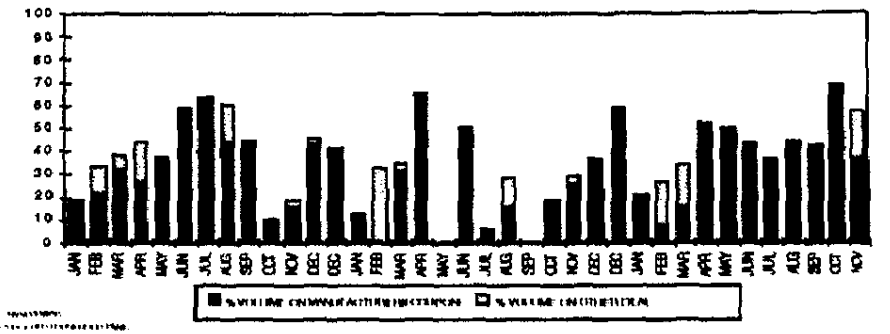


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

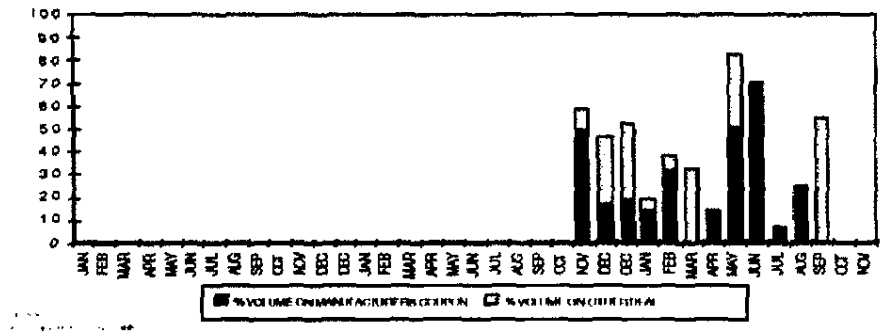
CAMBRIDGE
DEAL ACTIVITY
CONVENIENCE



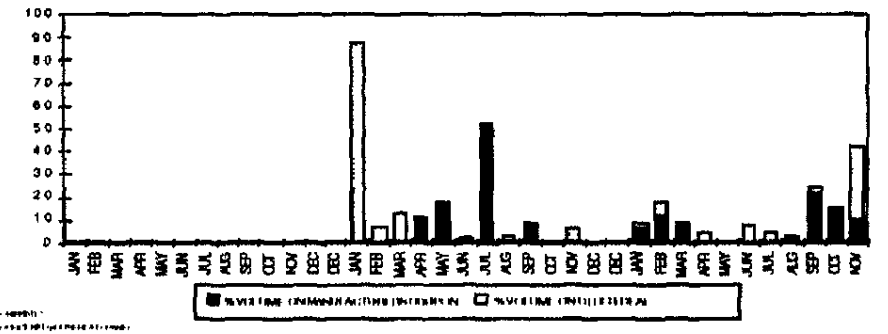
ALPINE FM/PV
DEAL ACTIVITY
CONVENIENCE



BUCKS
DEAL ACTIVITY
CONVENIENCE



BRISTOL
DEAL ACTIVITY
CONVENIENCE



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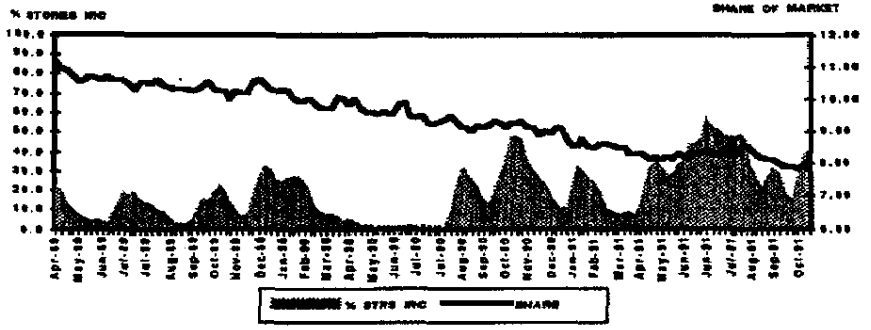
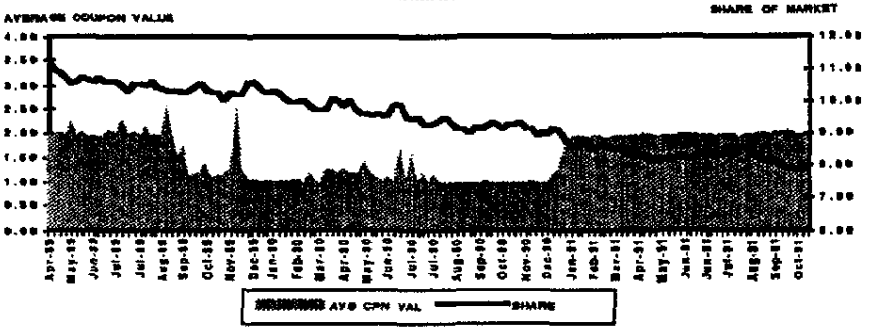
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

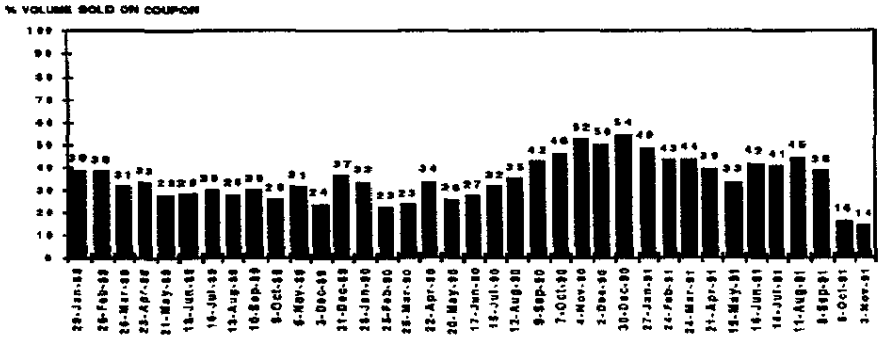
WINSTON
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



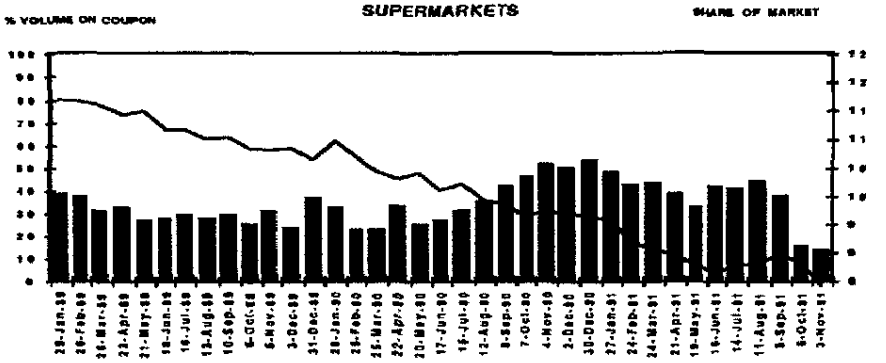
WINSTON
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVMEBER 3, 1991
SUPERMARKETS



WINSTON
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



WINSTON
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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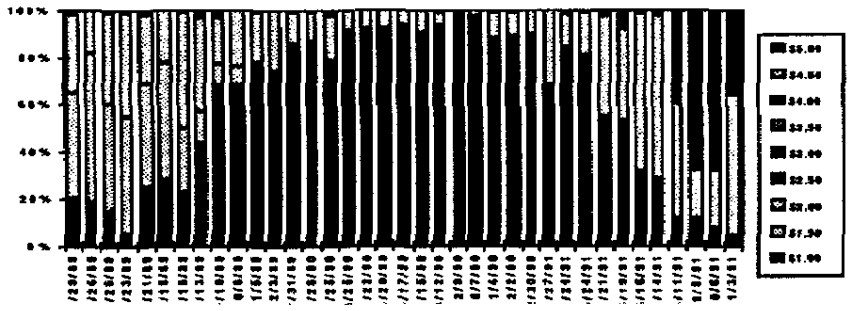
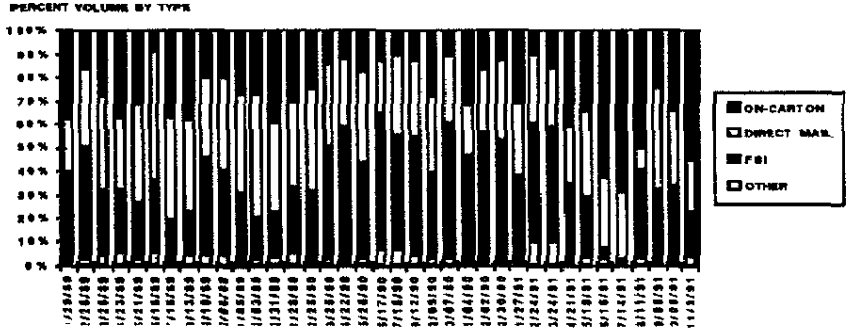
WINSTON
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

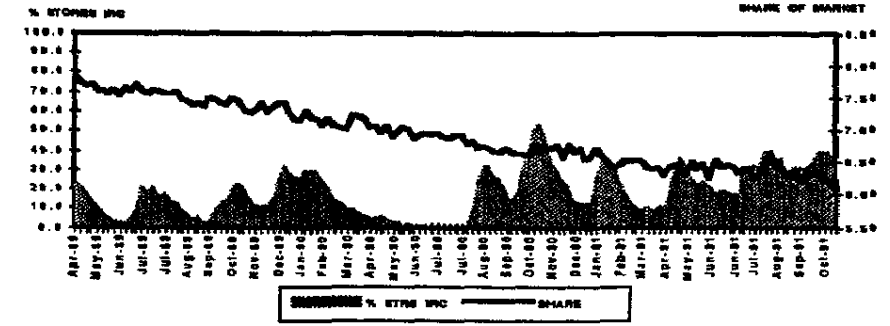


WINSTON
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

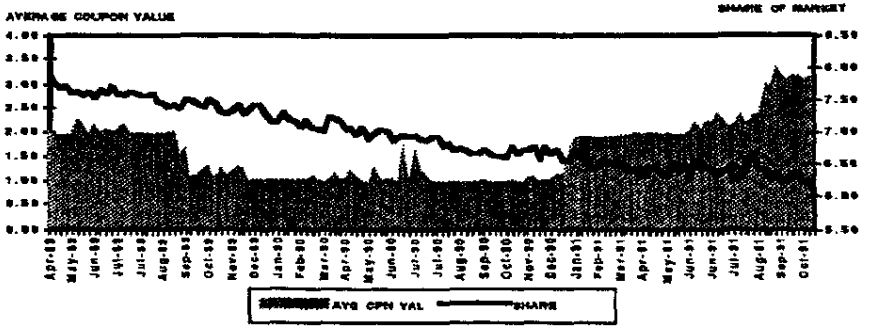


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

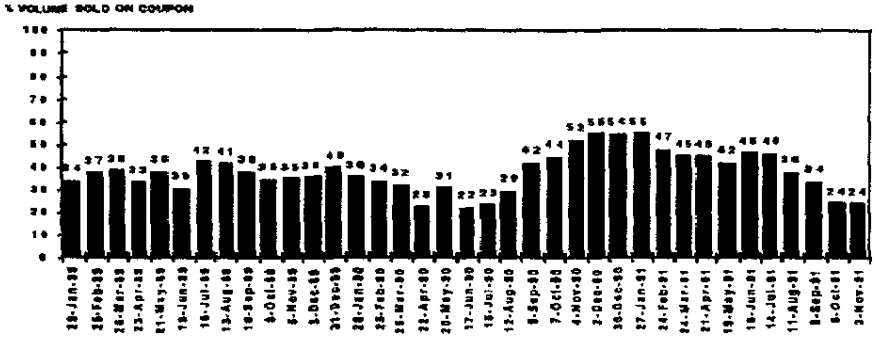
SALEM
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



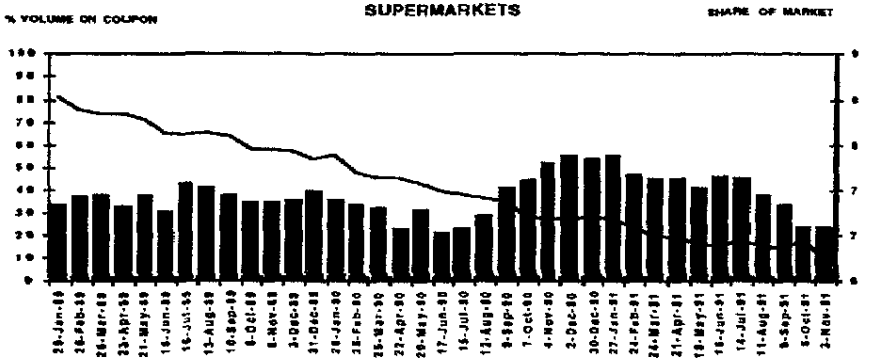
SALEM
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



SALEM
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



SALEM
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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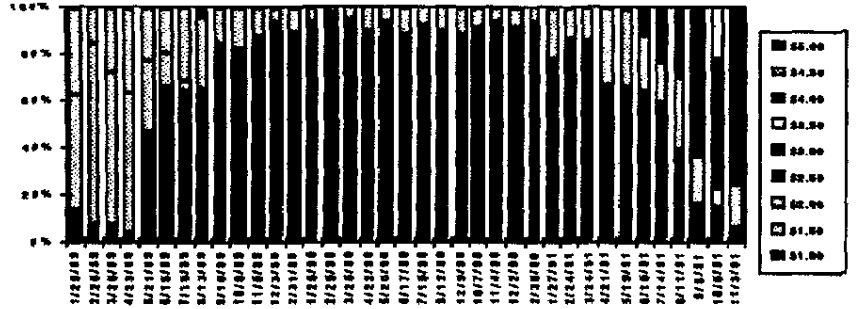
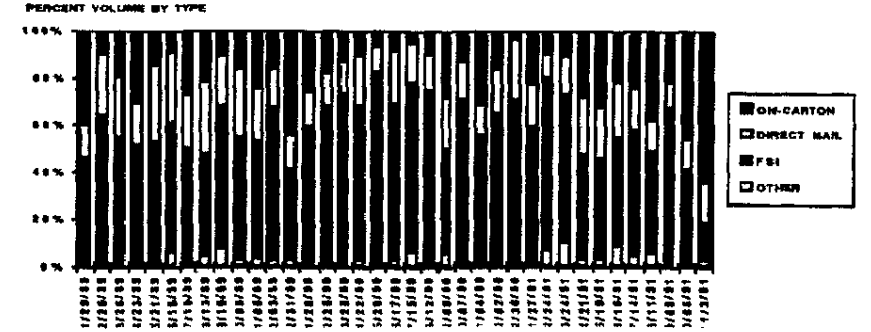
SALEM
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

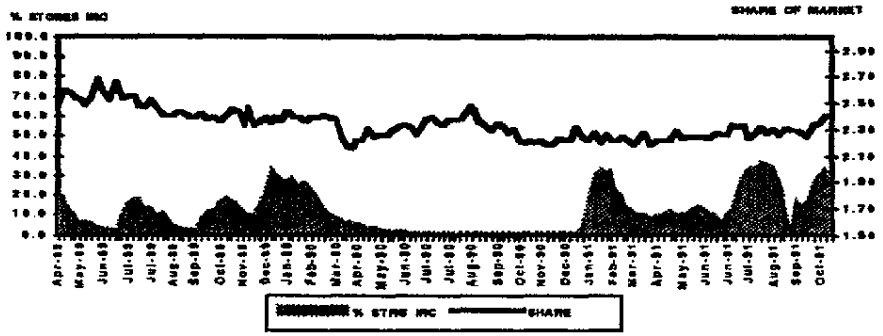


SALEM
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

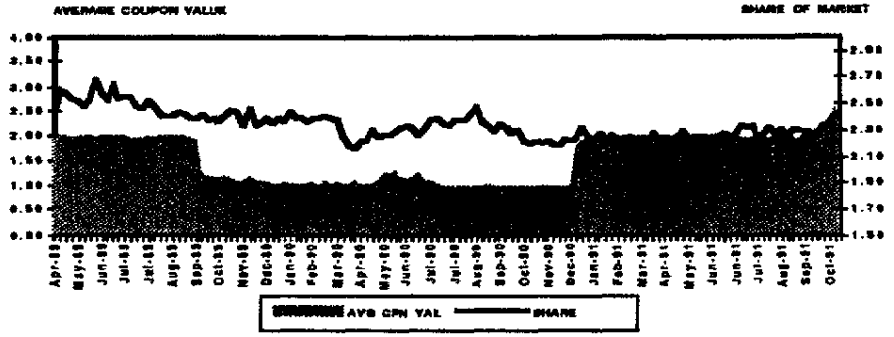


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

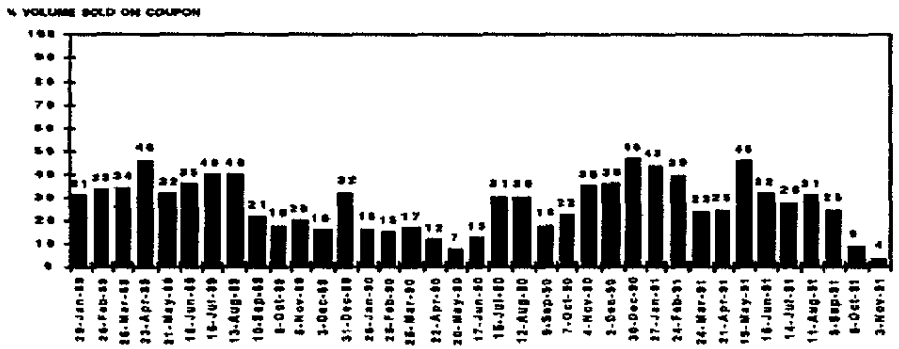
CAMEL FILTERS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



CAMEL FILTERS
IN-STORE PROMOTIONAL ACTIVITY
TOTAL U.S.: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



CAMEL FILTER
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



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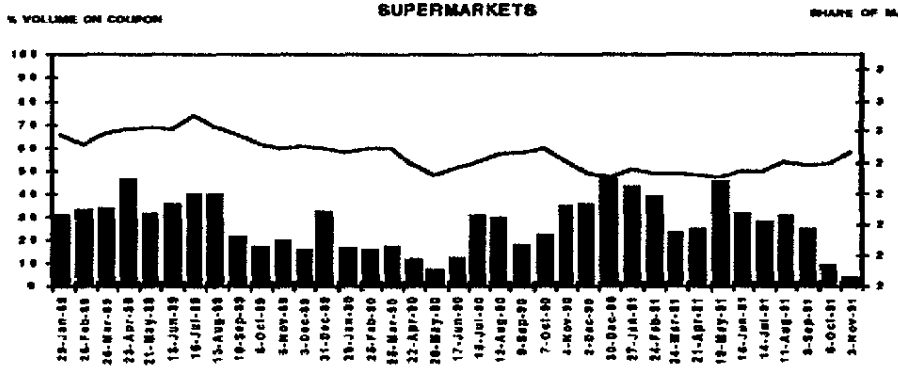
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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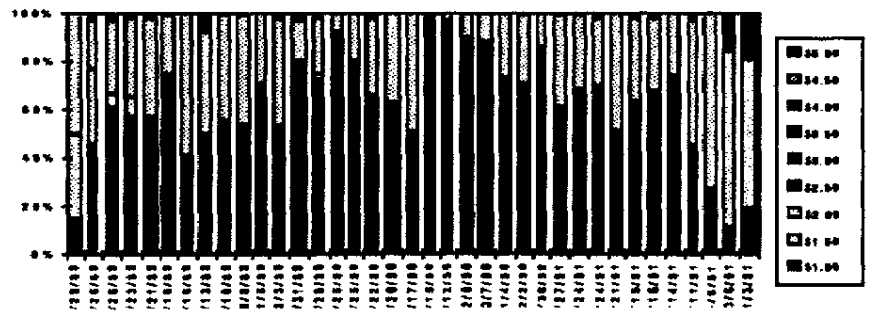
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



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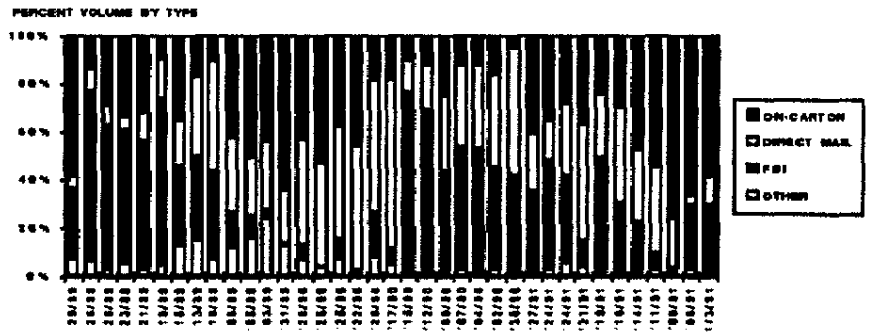
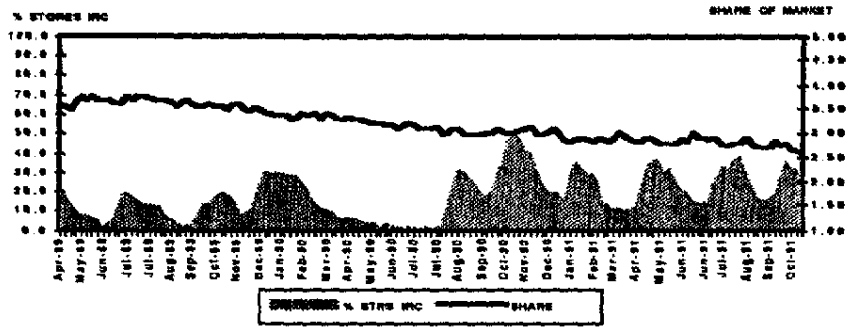
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

VANTAGE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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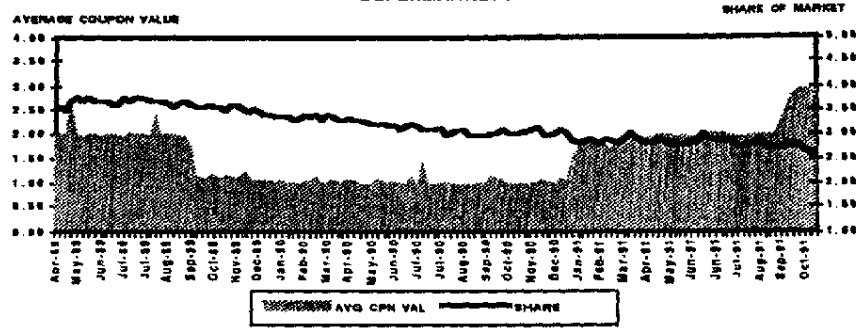
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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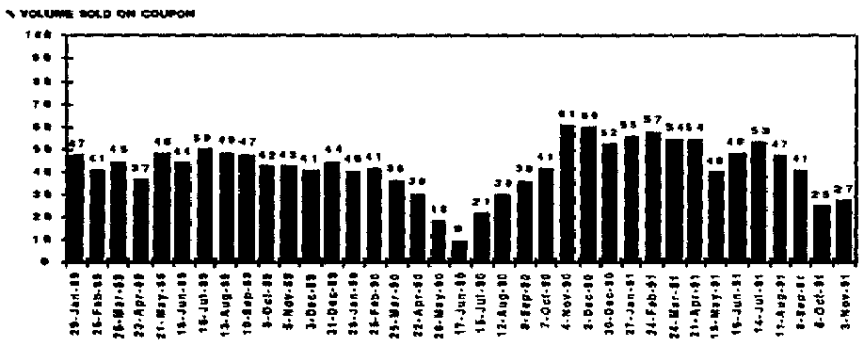
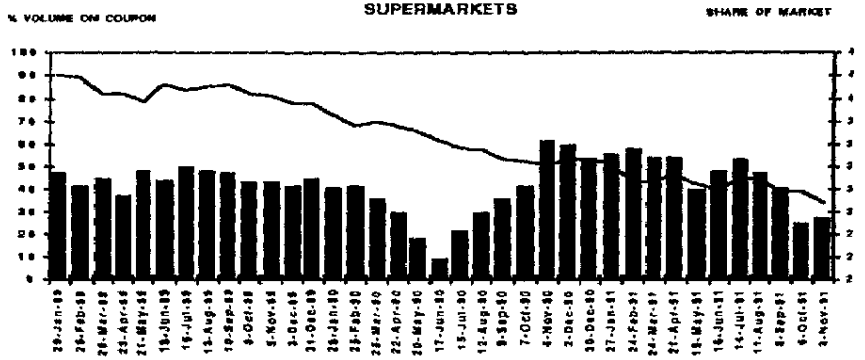
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



VANTAGE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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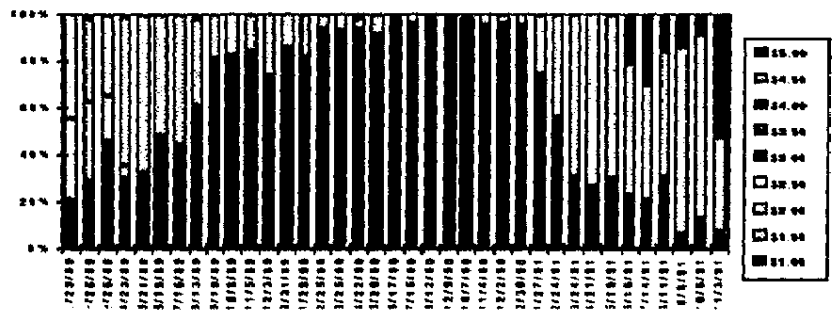
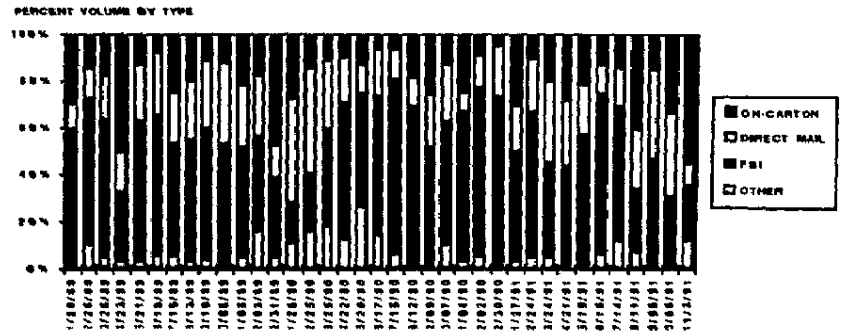
VANTAGE
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



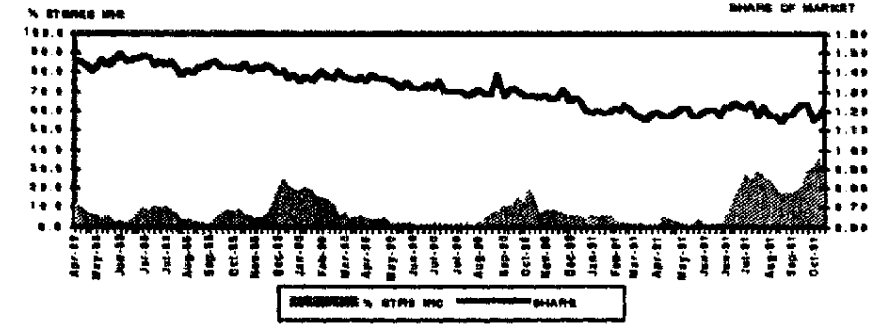
VANTAGE
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

MORE

IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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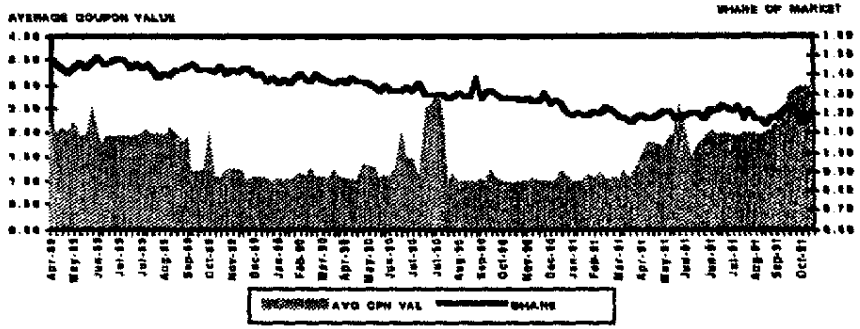
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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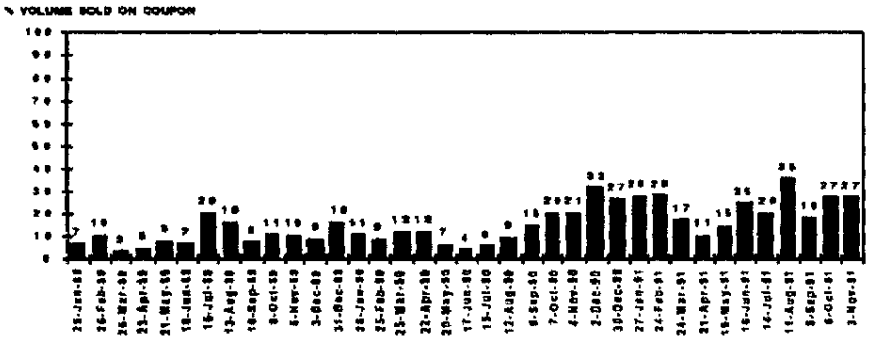
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



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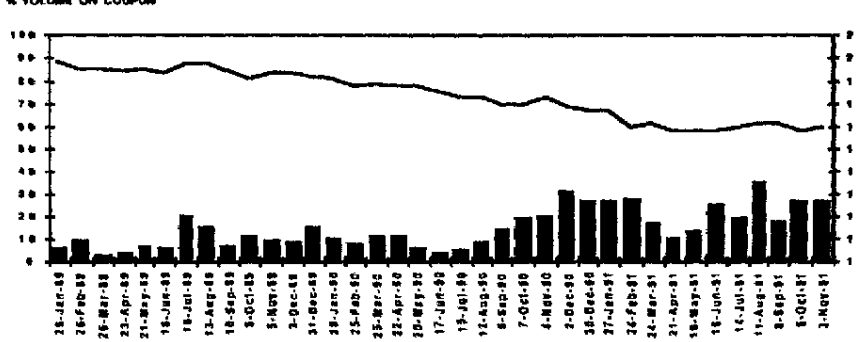
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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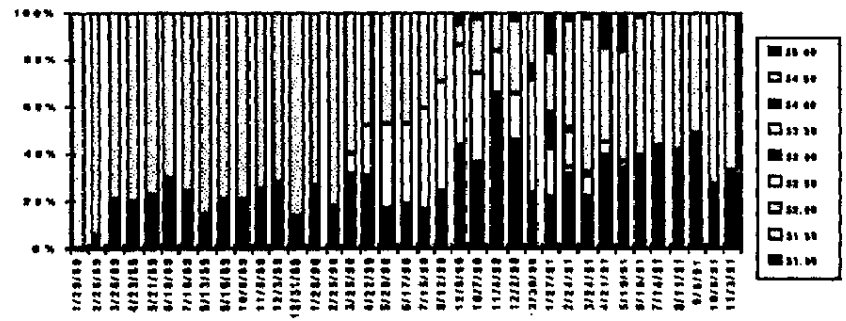
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



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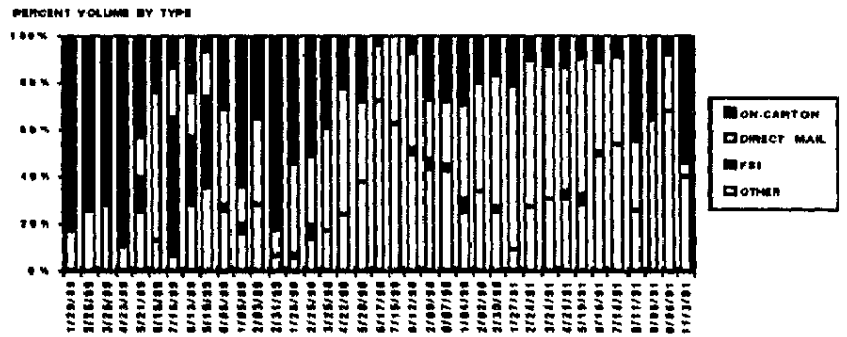
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

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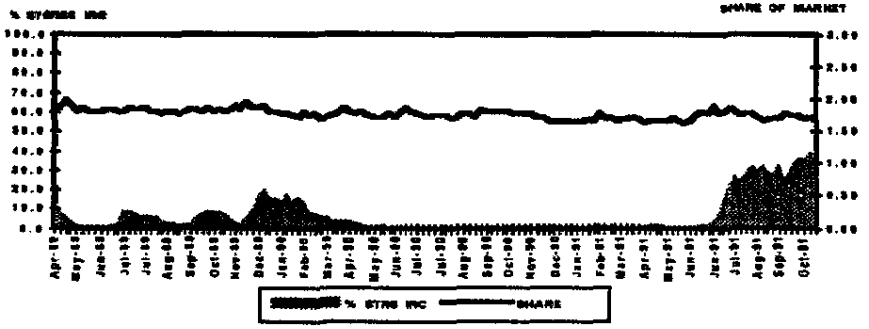
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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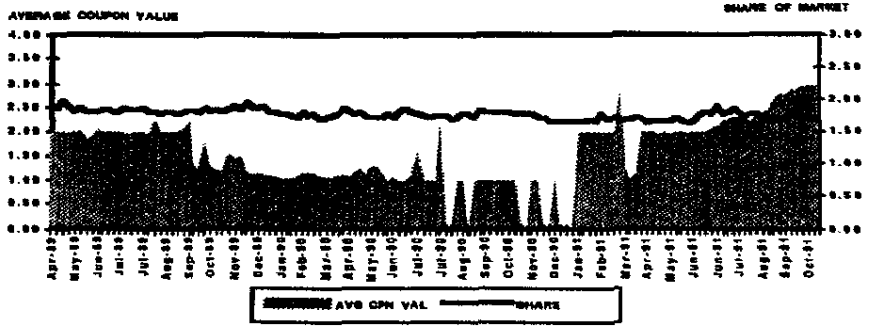
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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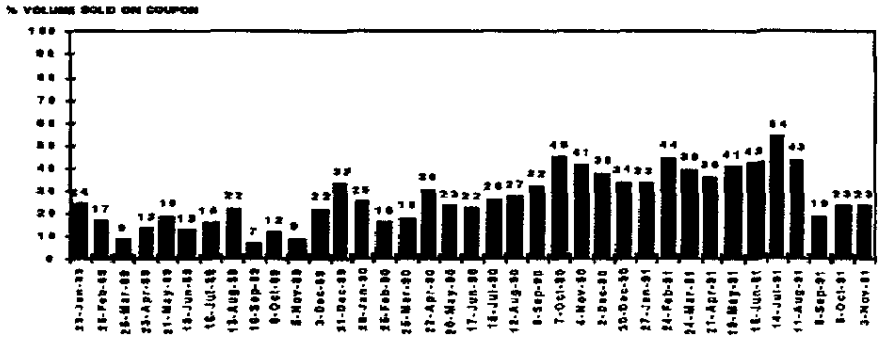
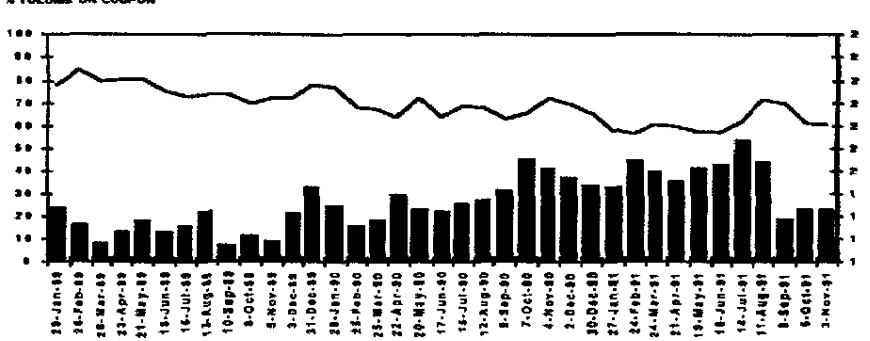
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



NOW
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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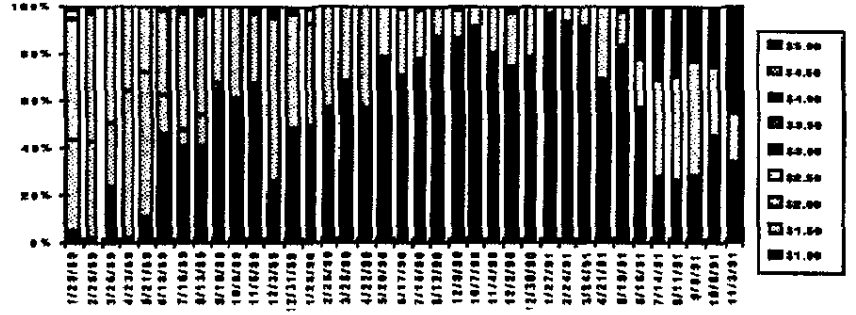
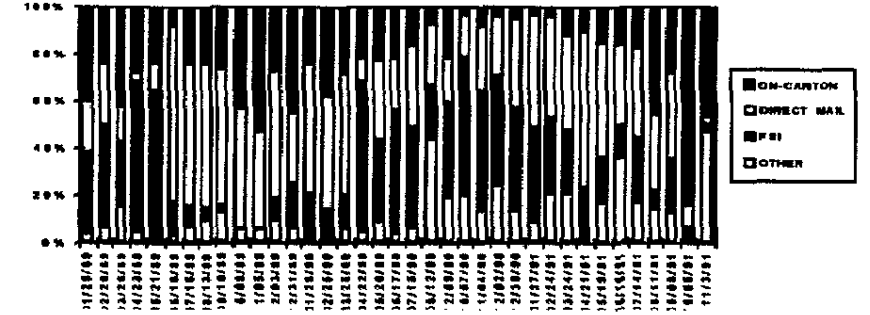
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

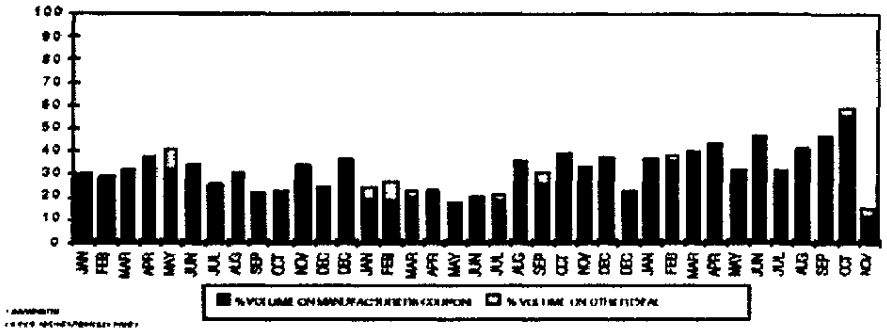


NOW
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

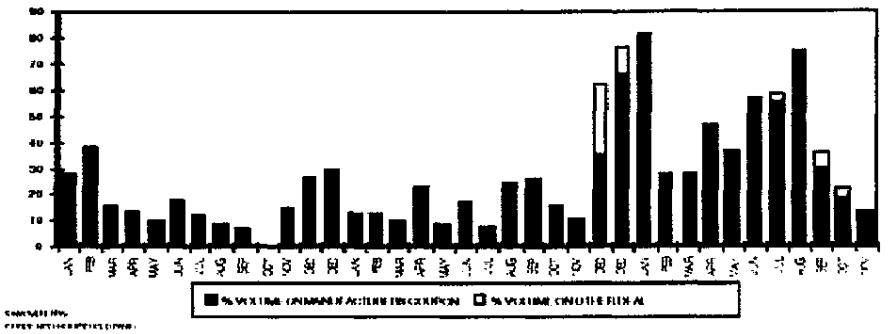


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

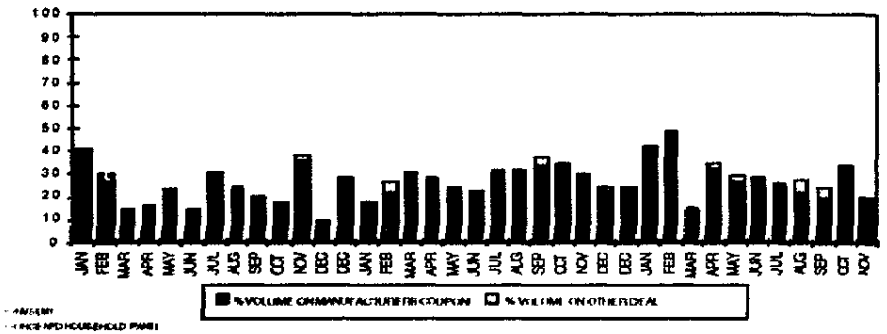
WINSTON
DEAL ACTIVITY
CONVENIENCE



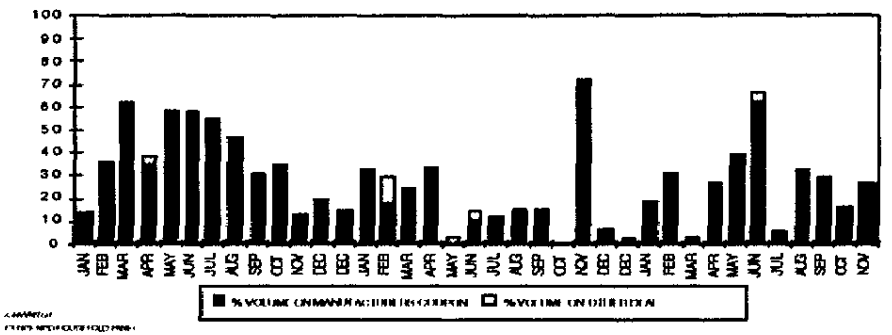
CAMEL FILTERS
DEAL ACTIVITY
CONVENIENCE



SALEM
DEAL ACTIVITY
CONVENIENCE



VANTAGE
DEAL ACTIVITY
CONVENIENCE



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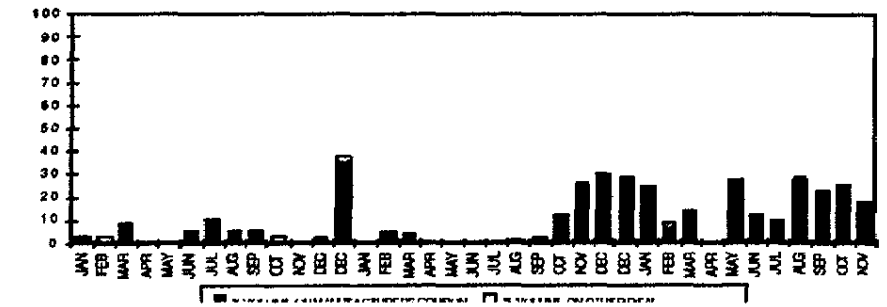
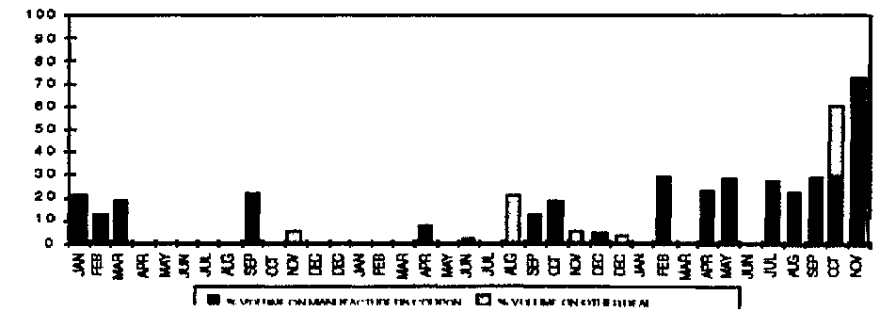
MORE
DEAL ACTIVITY
CONVENIENCE

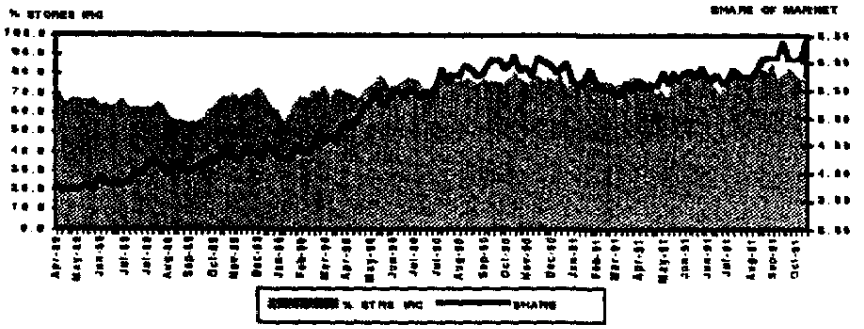


NOW
DEAL ACTIVITY
CONVENIENCE



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

DORAL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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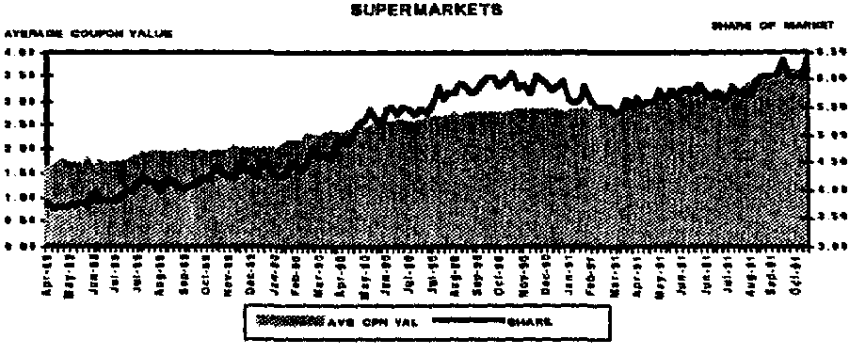
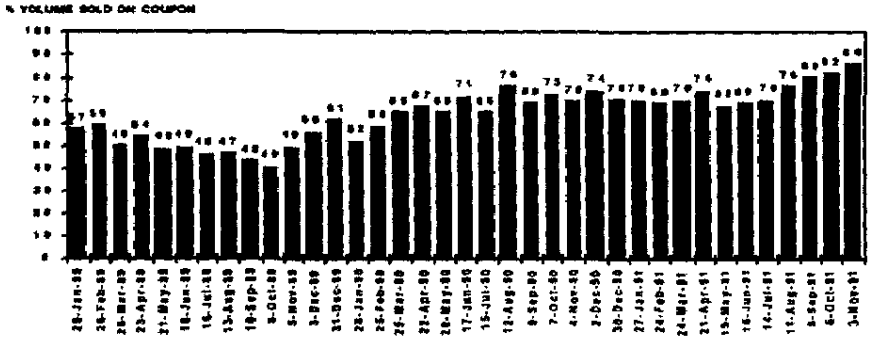
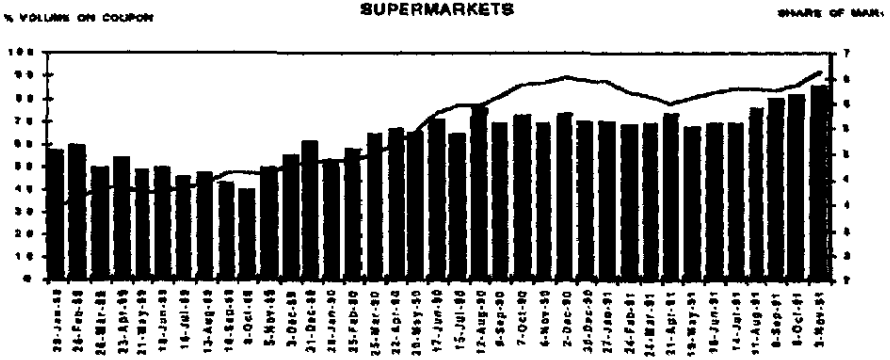
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



DORAL
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



DORAL
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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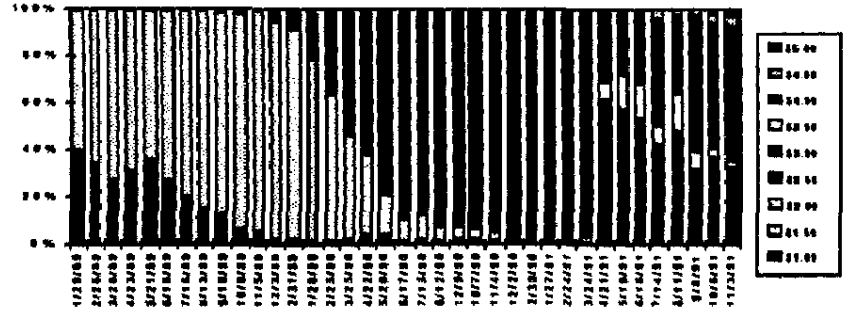
DORAL
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



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PERCENT VOLUME ON COUPON BY TYPE
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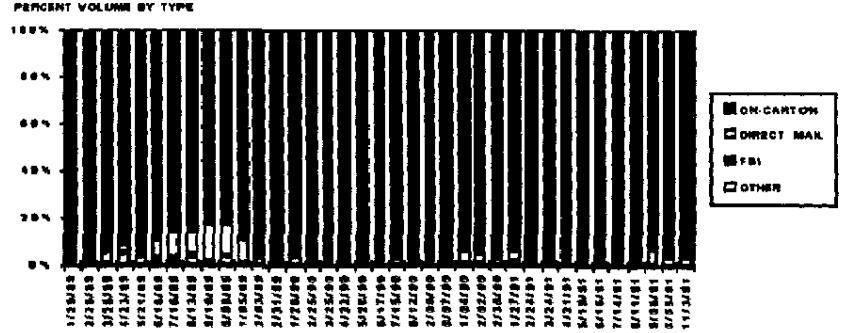
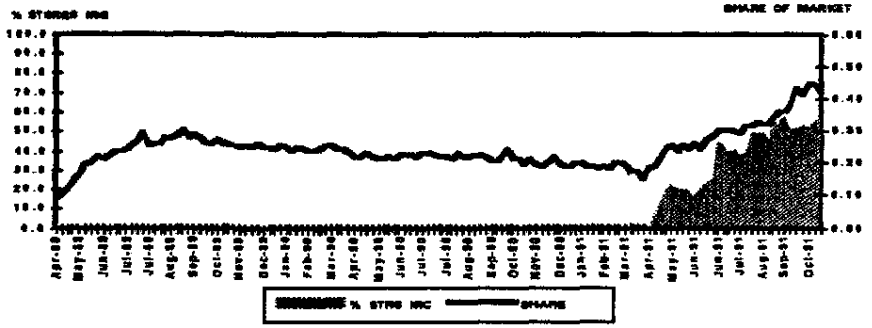


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

MAGNA
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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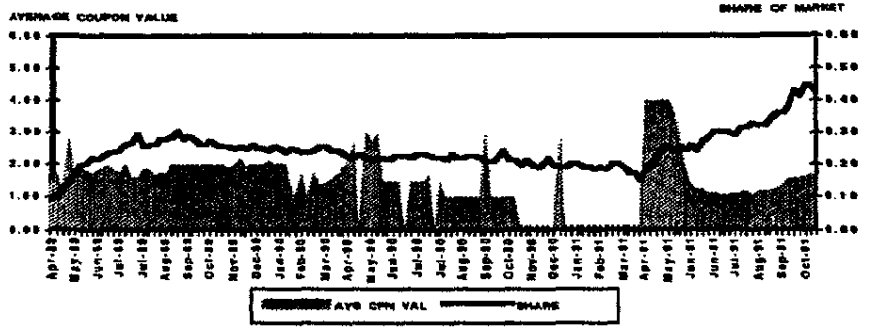
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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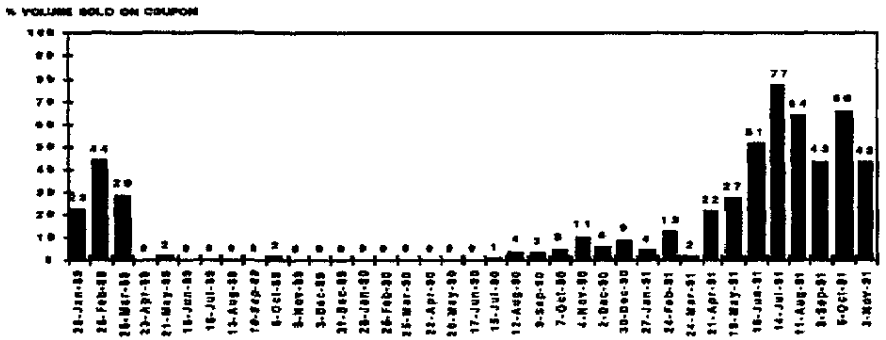
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



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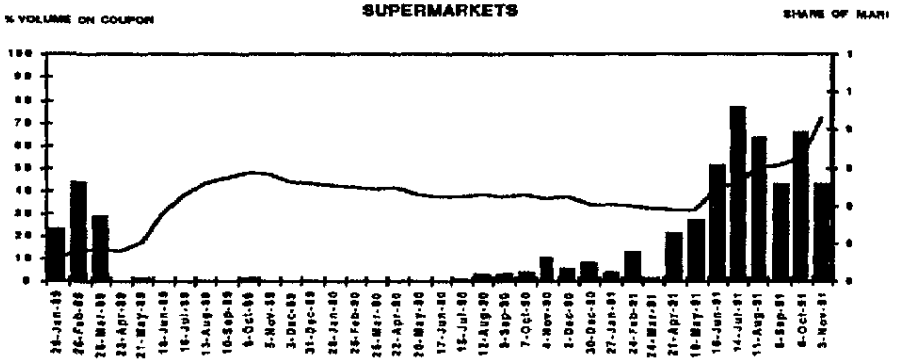
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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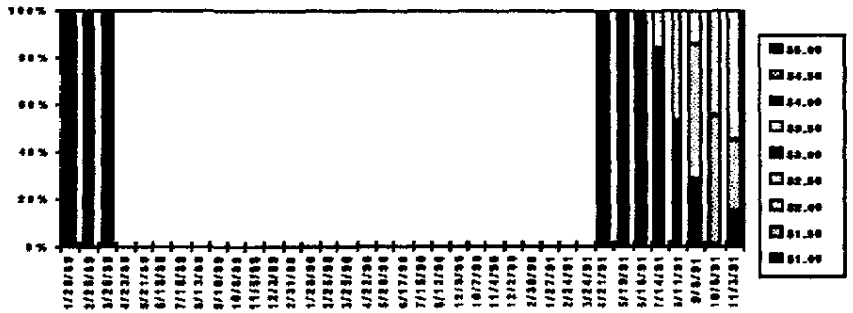
SUPERMARKETS



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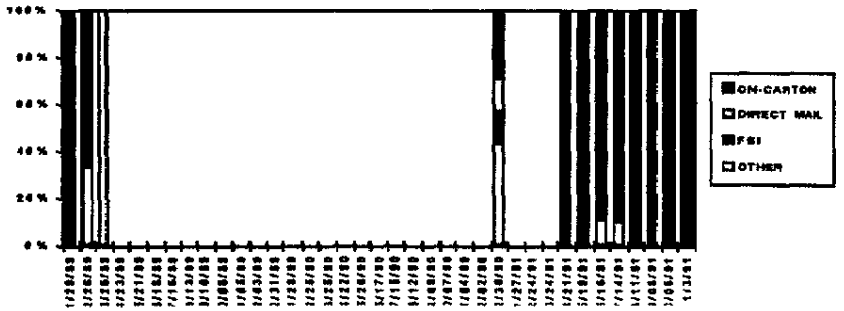
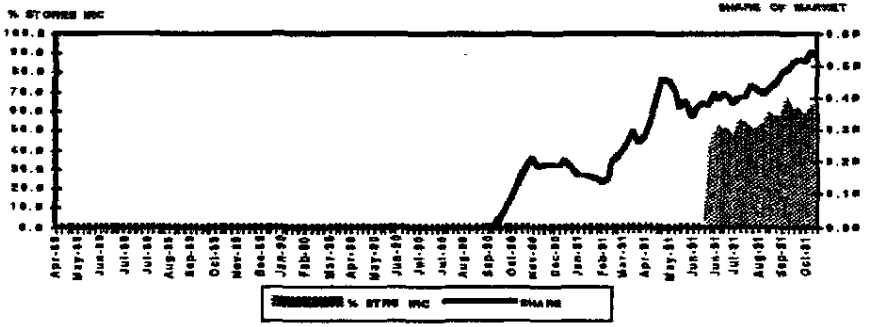
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

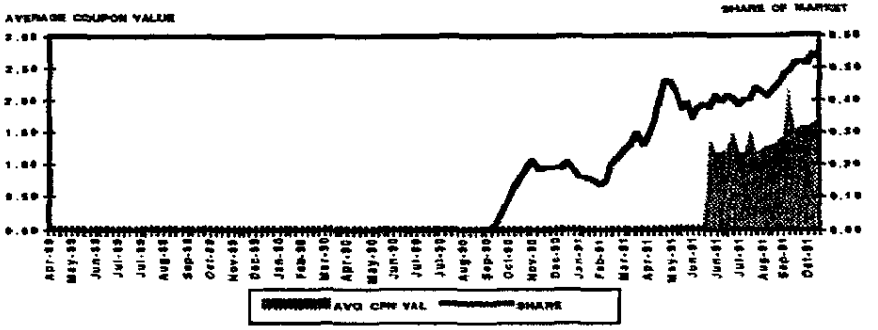


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

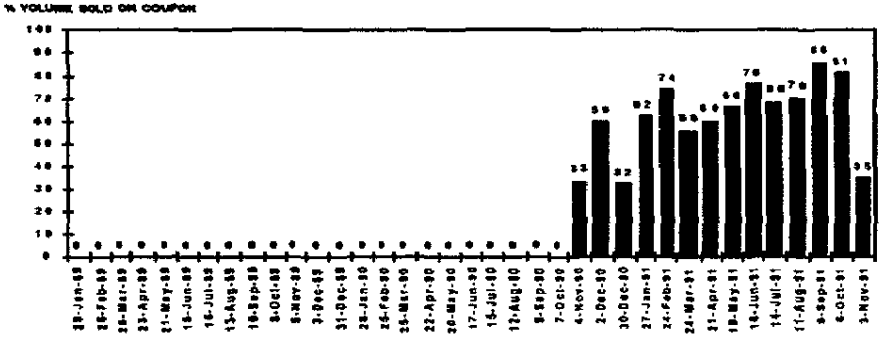
STERLING
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



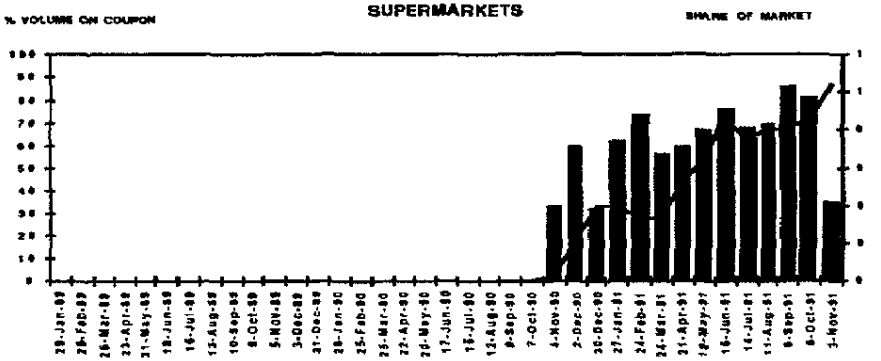
STERLING
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



STERLING
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



STERLING
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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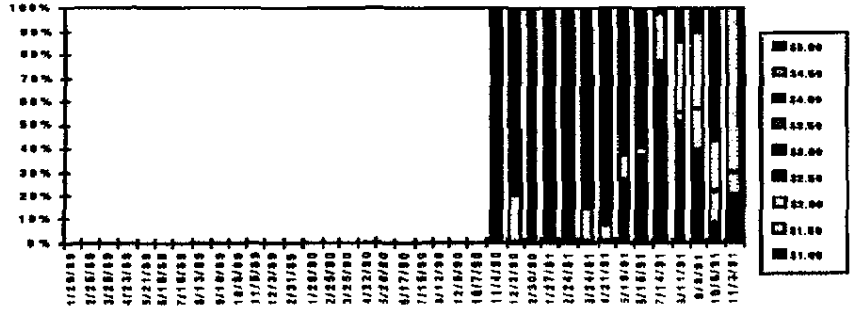
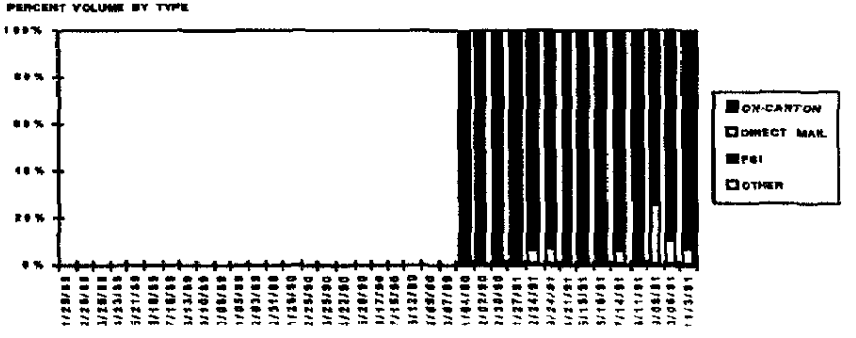
SUPERMARKETS



STERLING
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

DORAL
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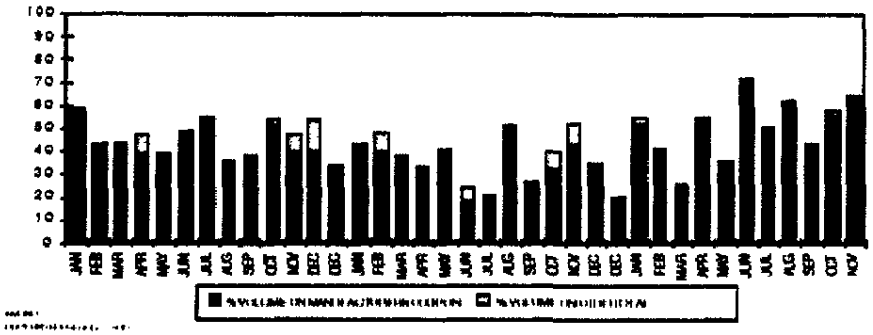
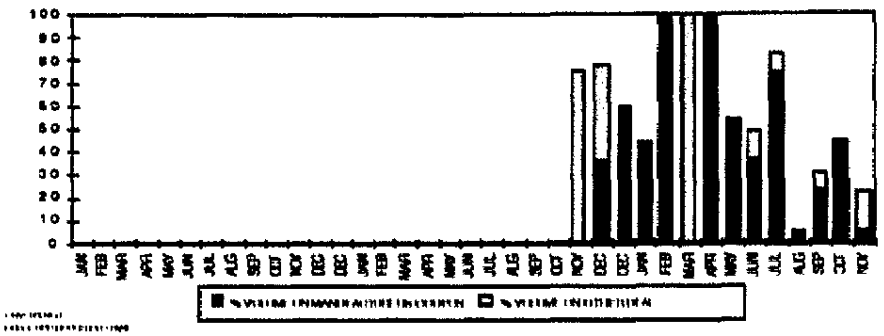
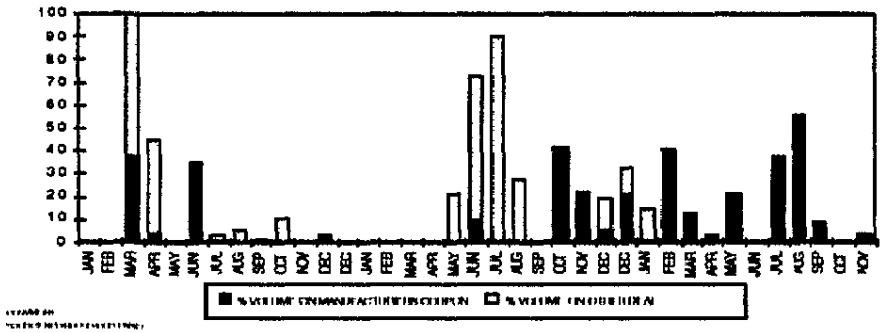
CONVENIENCE



STERLING
DEAL ACTIVITY
CONVENIENCE



MAGNA
DEAL ACTIVITY
CONVENIENCE



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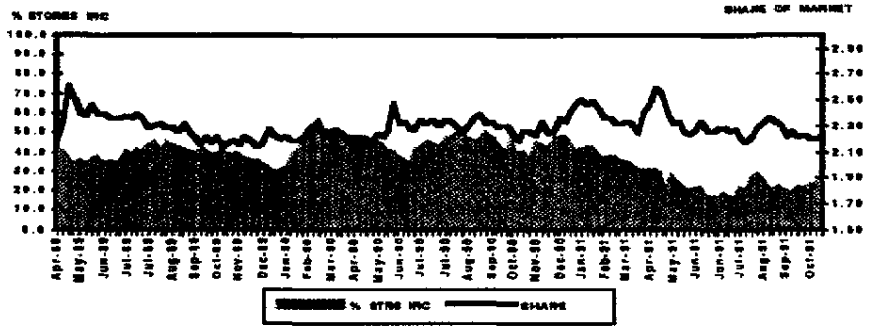
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

NEWPORT
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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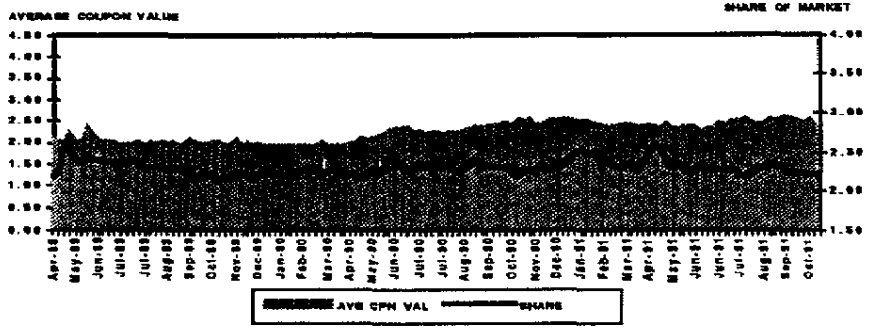
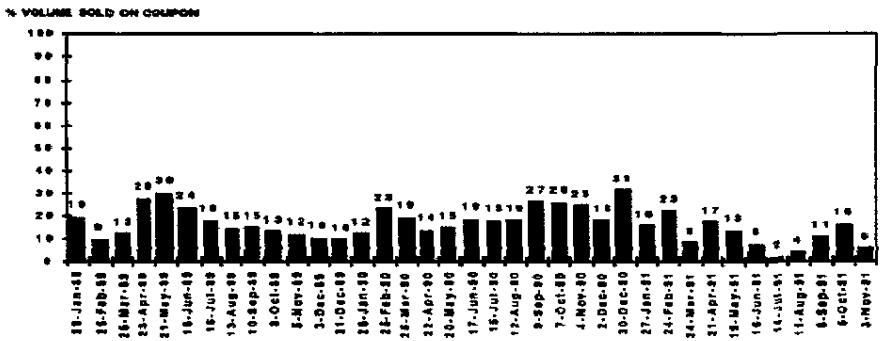
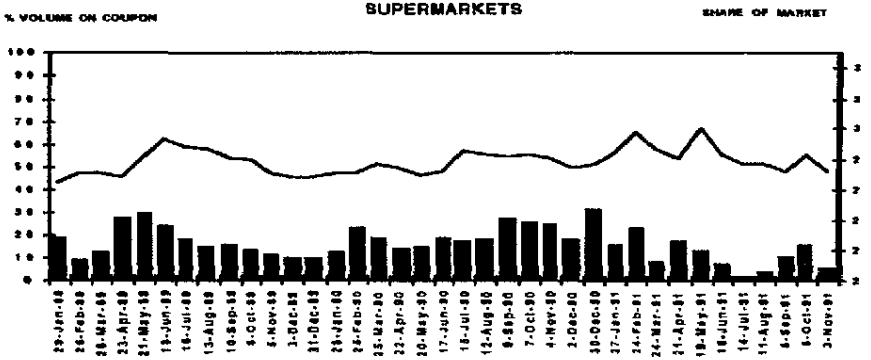
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



NEWPORT
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



NEWPORT
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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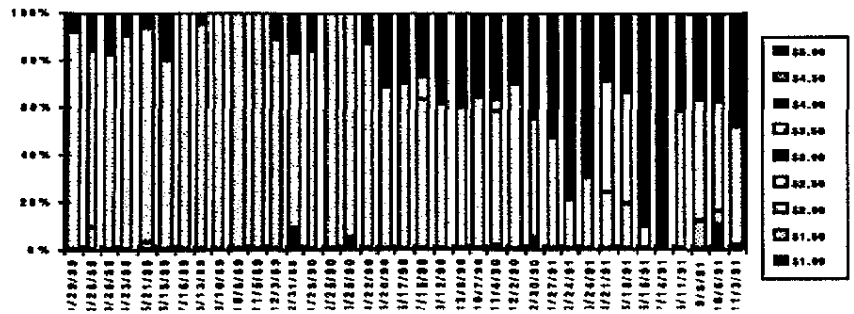
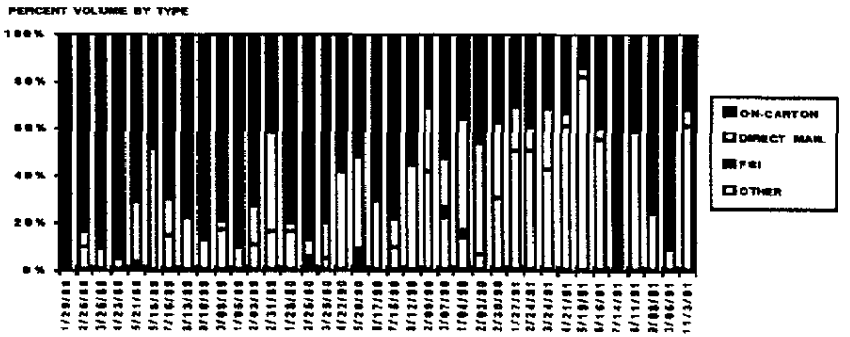
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



NEWPORT
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

TRUE
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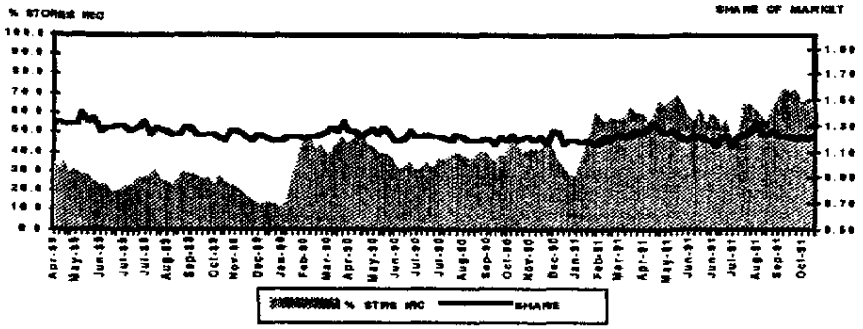
TOTAL U.S.: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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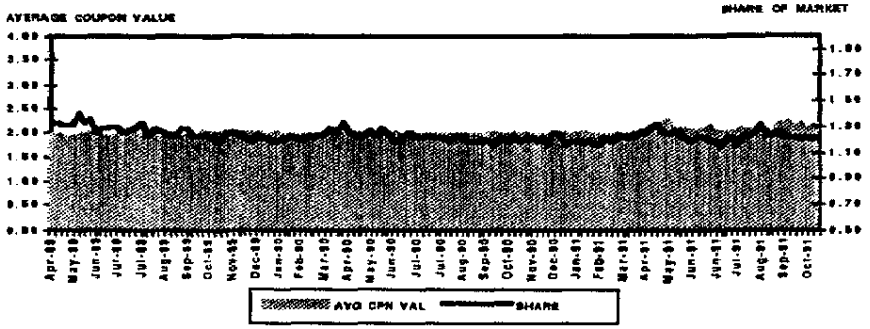
TOTAL U.S.: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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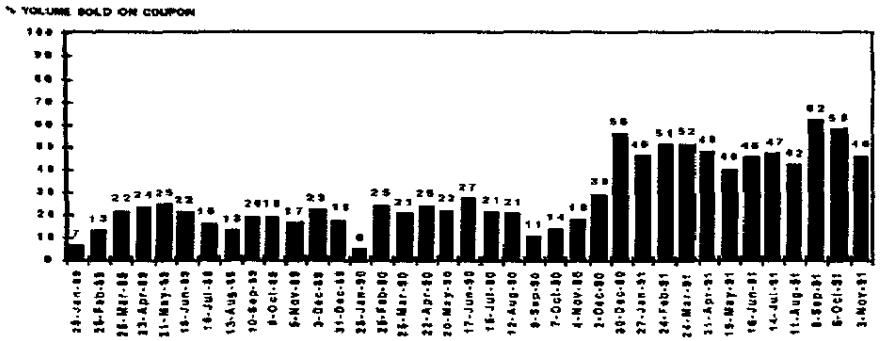
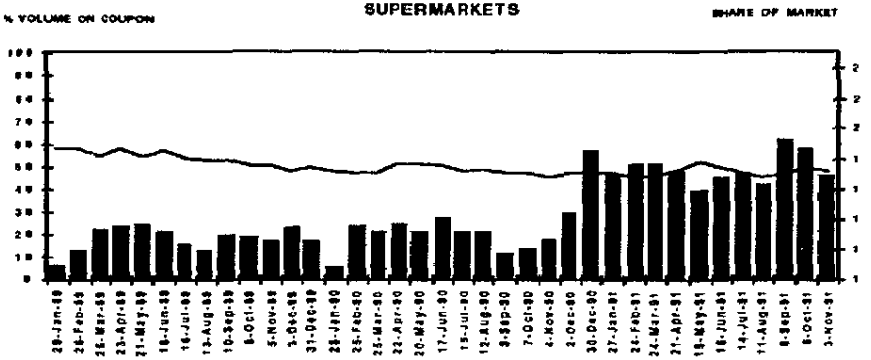
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



TRUE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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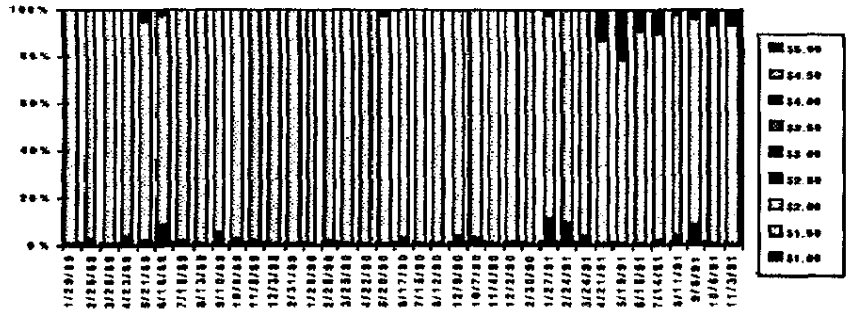
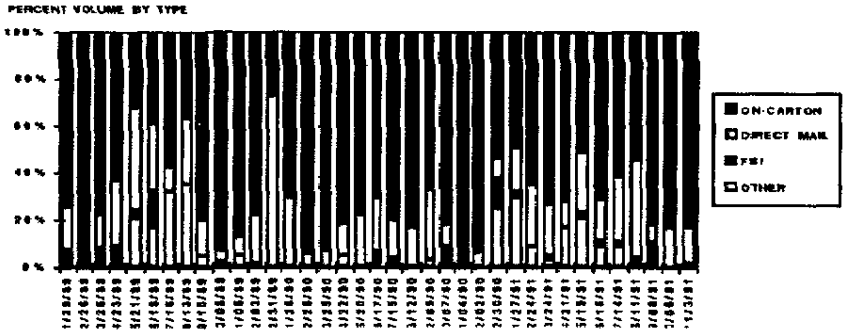
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

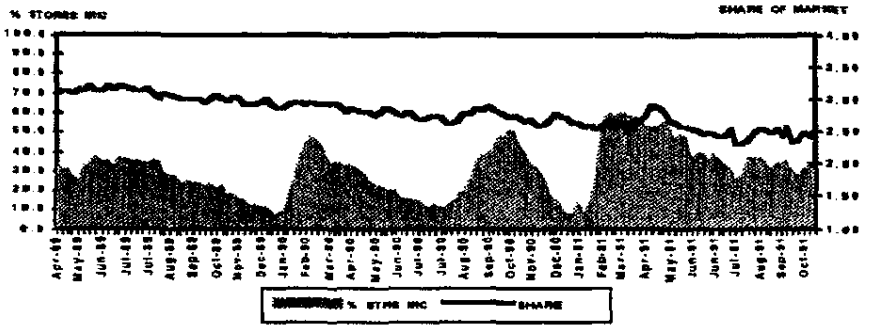


TRUE
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

KENT
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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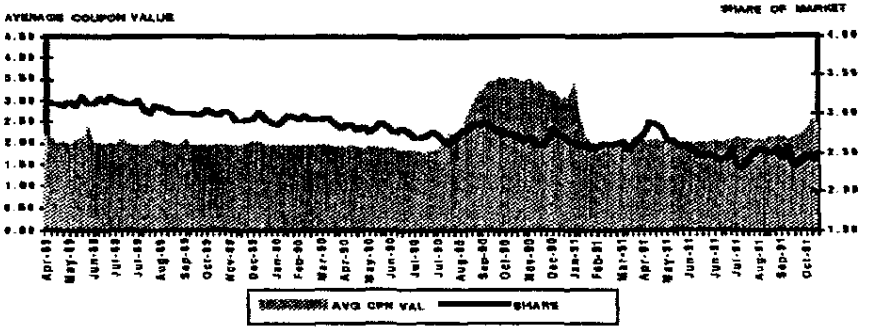
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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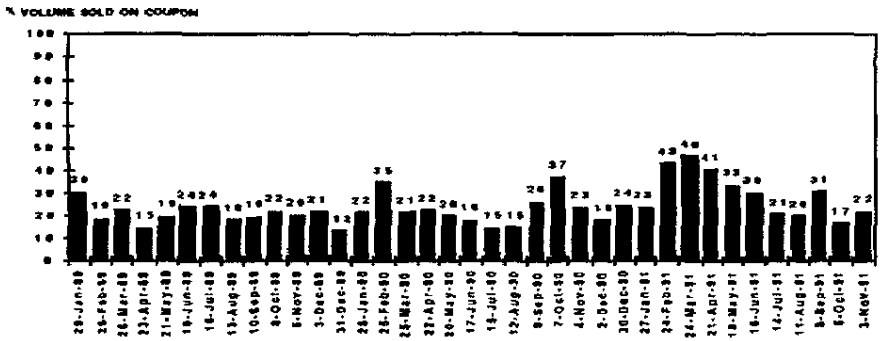
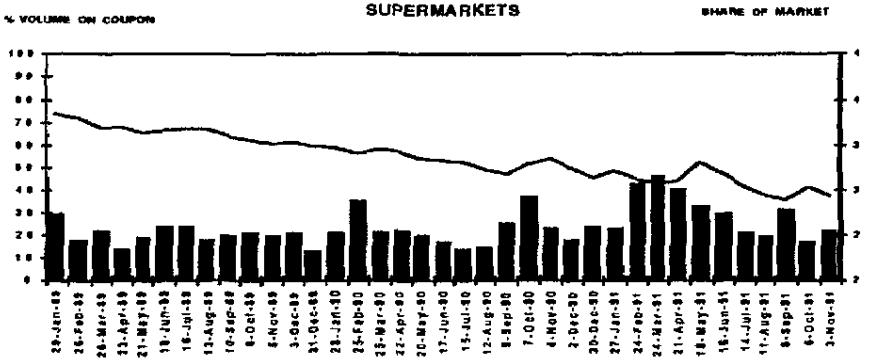
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



KENT
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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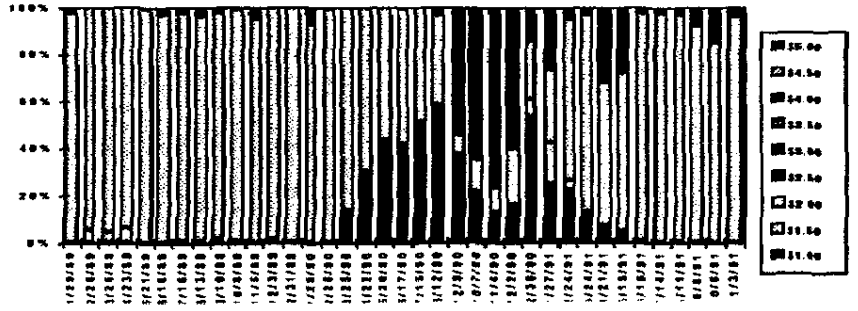
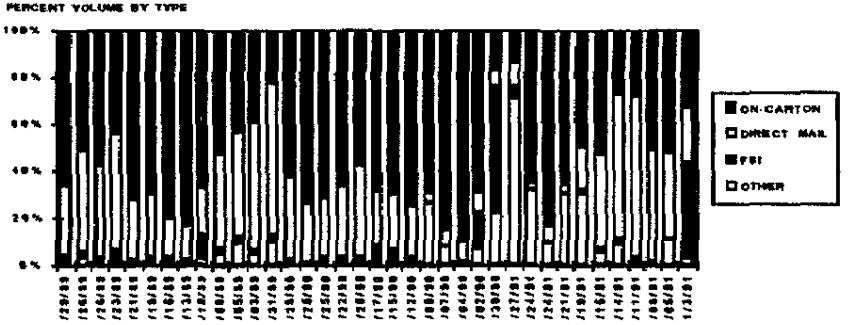
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

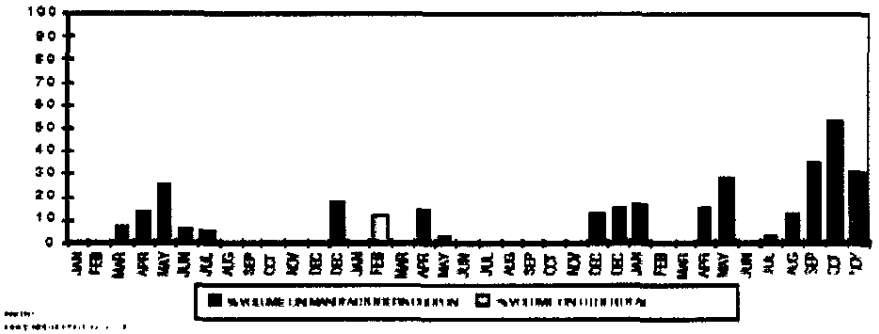


KENT
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

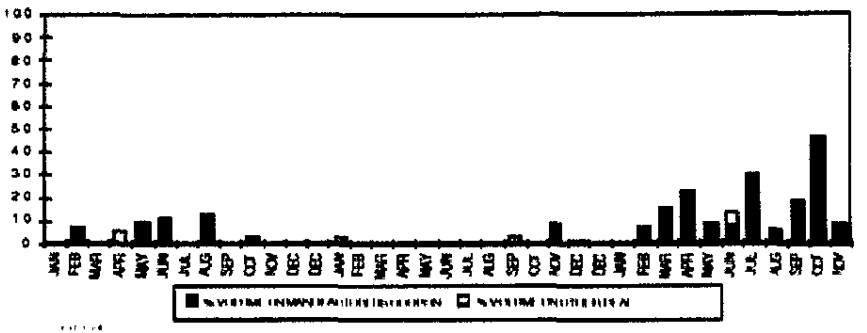


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

TRUE
DEAL ACTIVITY
CONVENIENCE



KENT
DEAL ACTIVITY
CONVENIENCE



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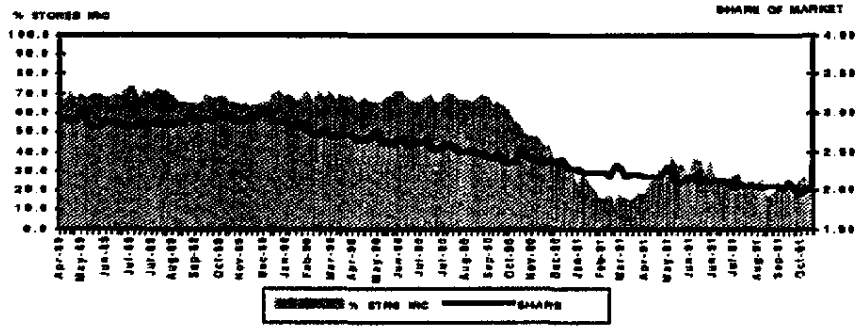
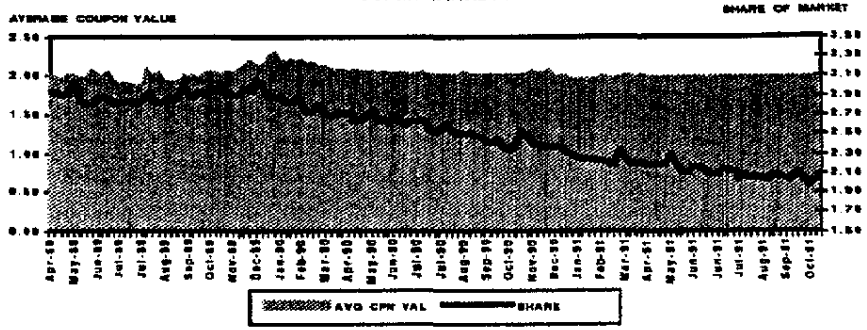
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

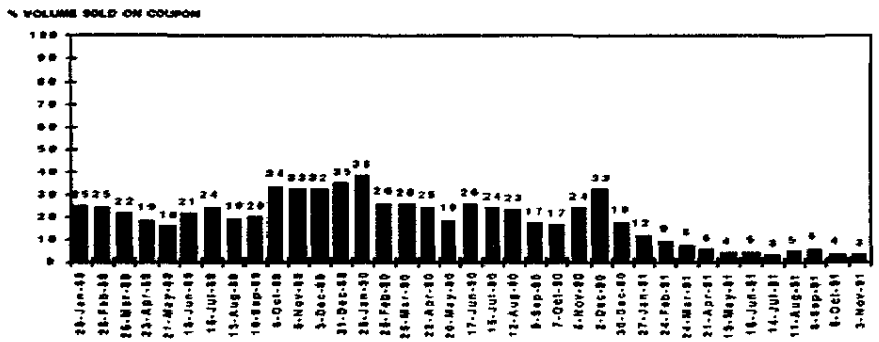
PALL MALL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



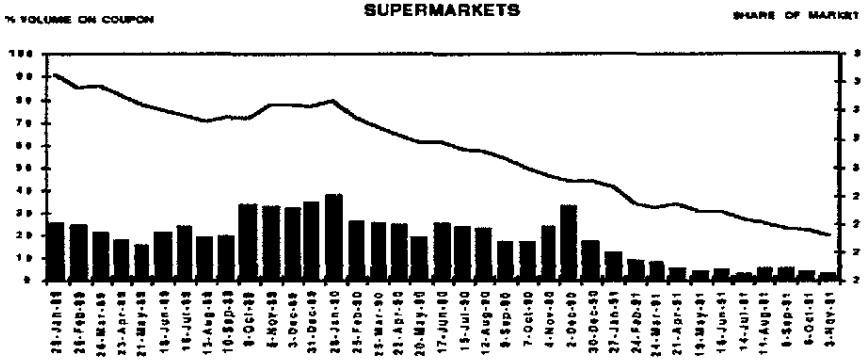
PALL MALL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



PALL MALL
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



PALL MALL
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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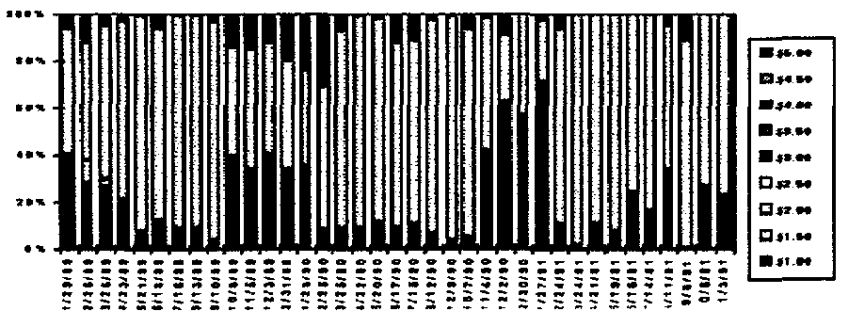
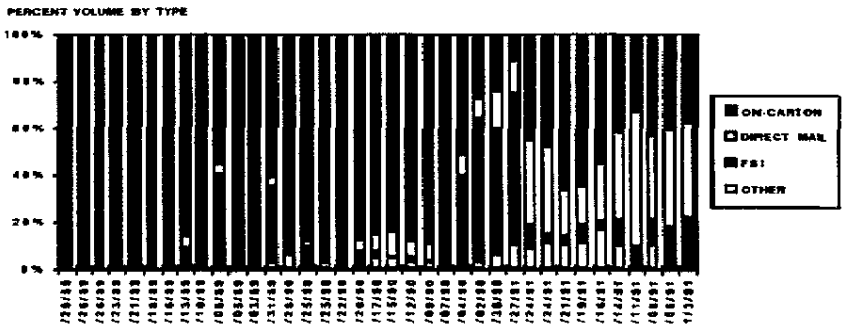
SUPERMARKETS

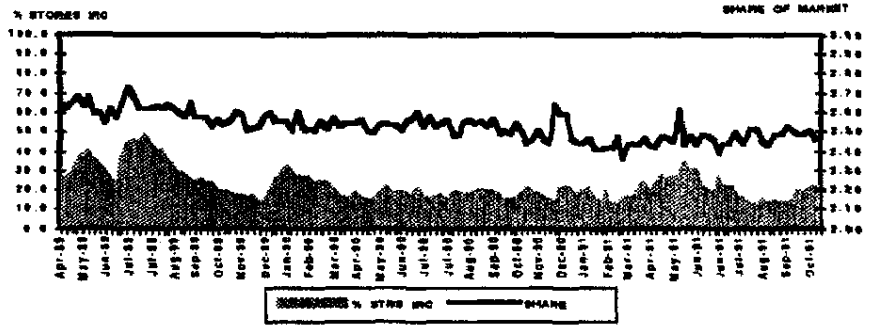


PALL MALL
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

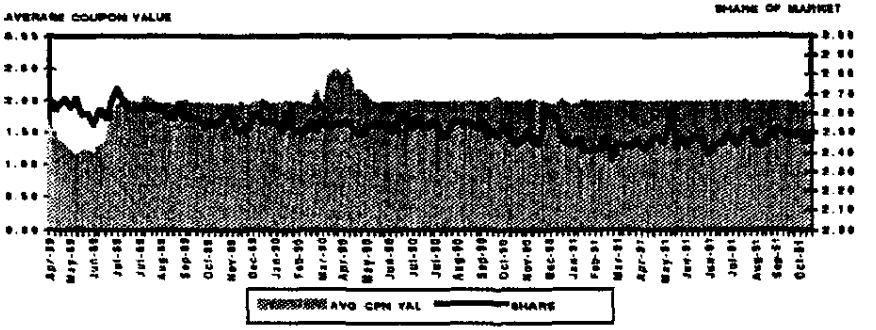


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

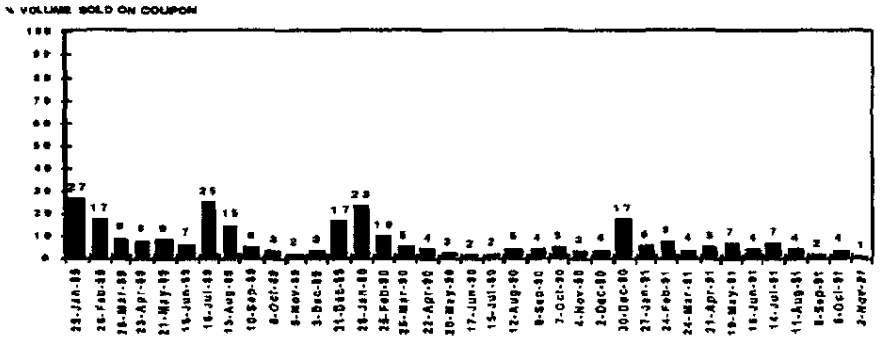
CARLTON
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



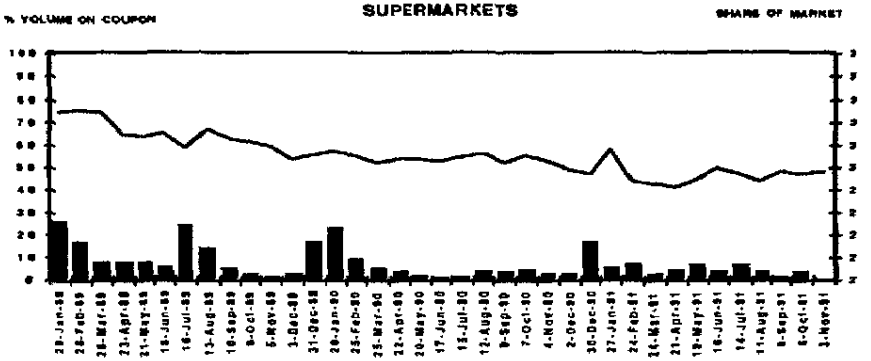
CARLTON
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



CARLTON
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



CARLTON
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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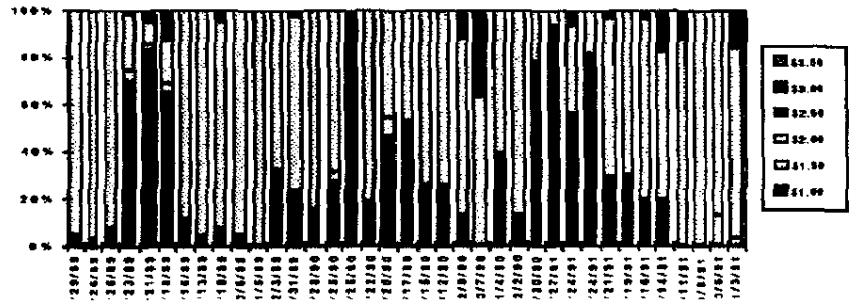
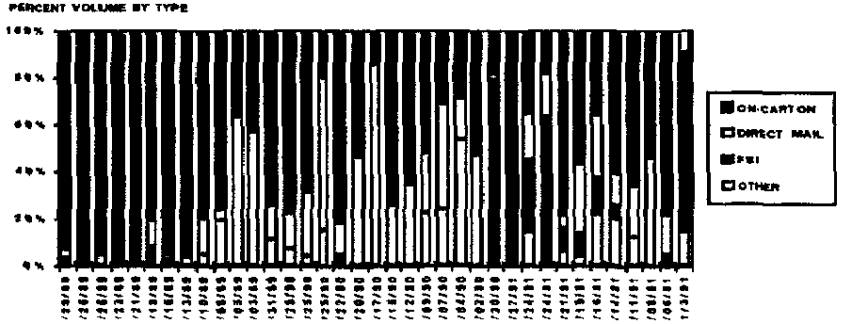
SUPERMARKETS

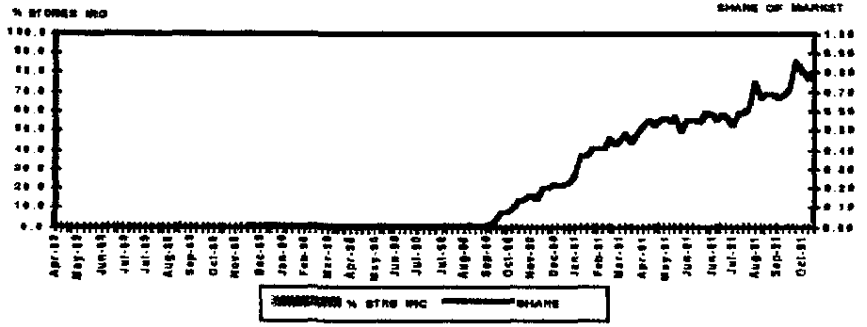


CARLTON
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

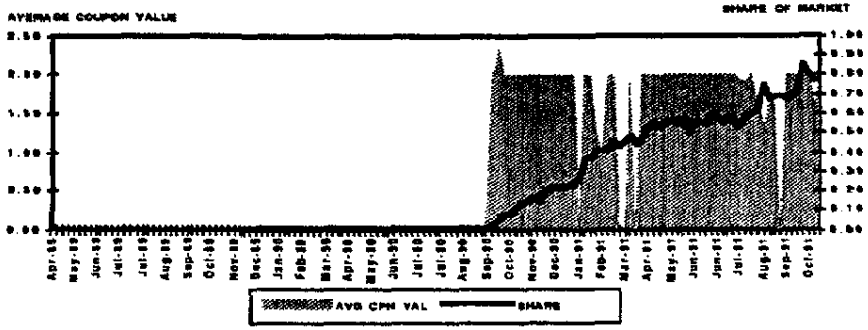


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

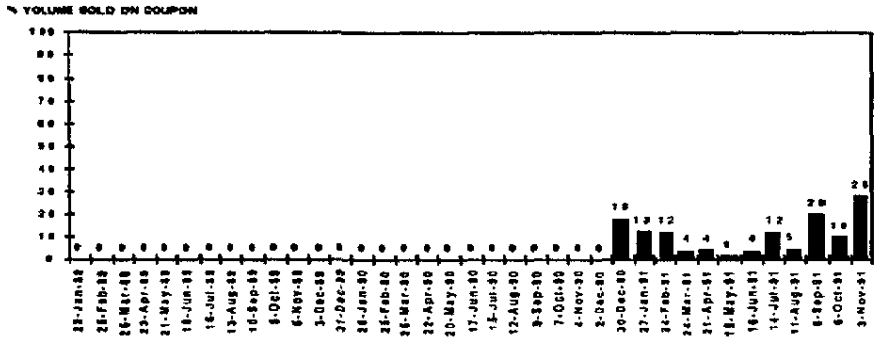
MISTY
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



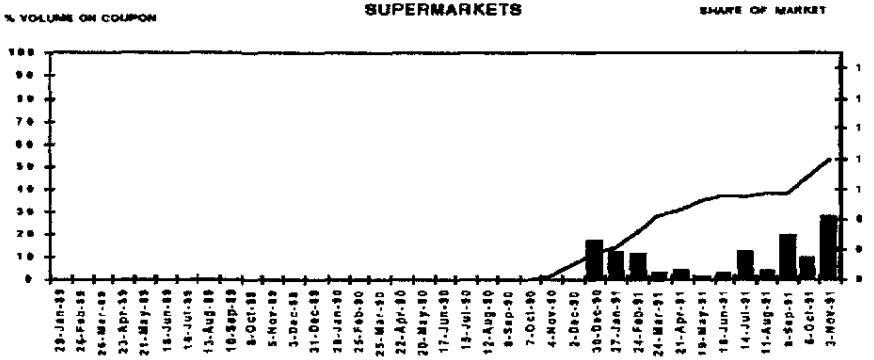
MISTY
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



MISTY
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



MISTY
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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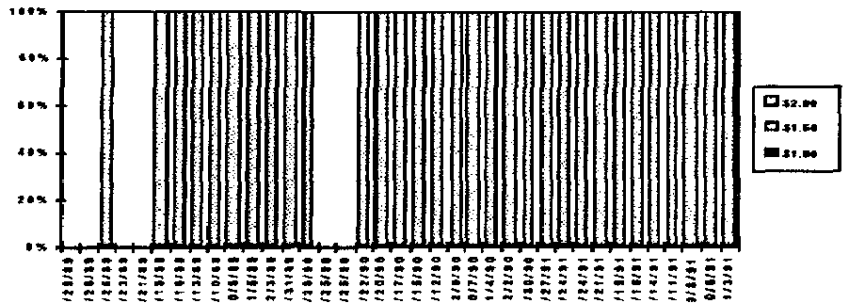
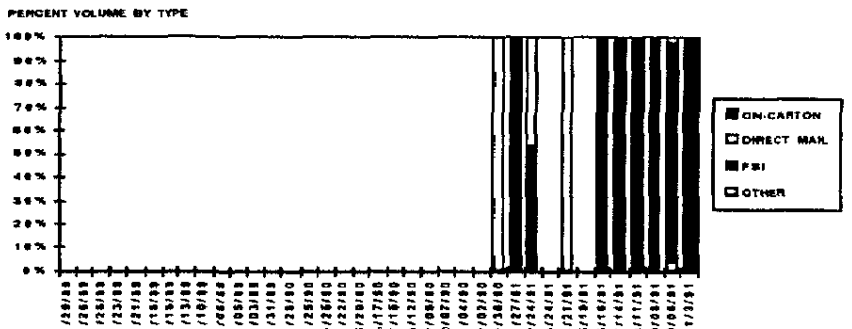
MISTY
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

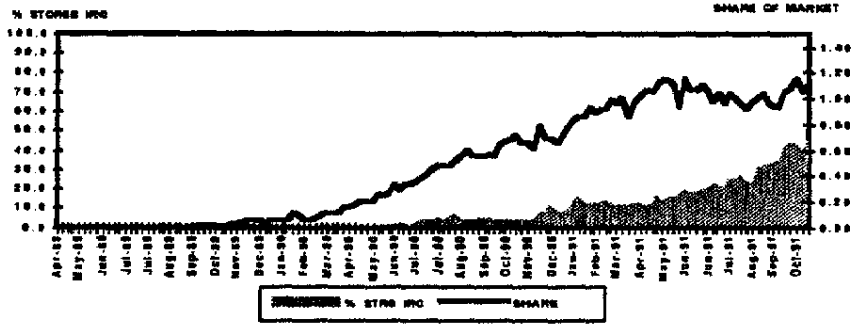


MISTY
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

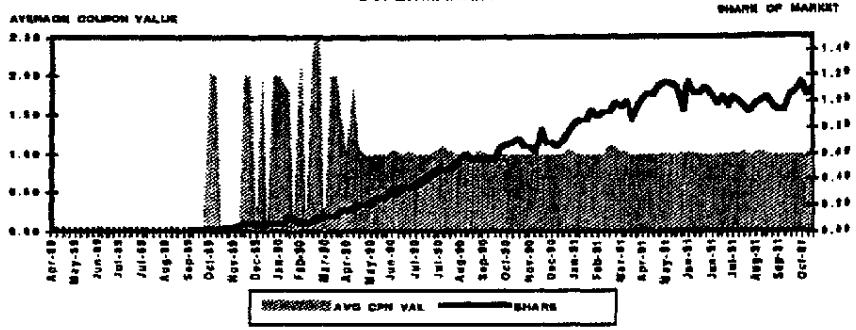


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

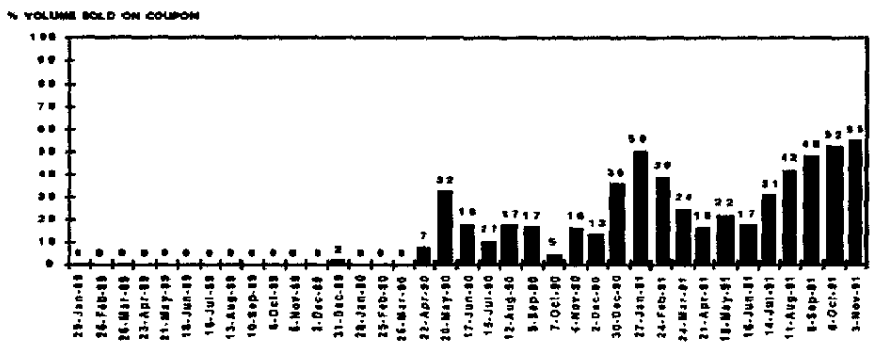
MONTCLAIR
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



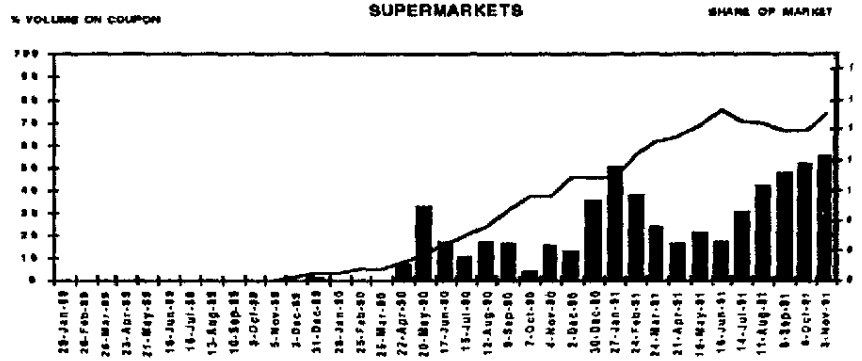
MONTCLAIR
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



MONTCLAIR
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS

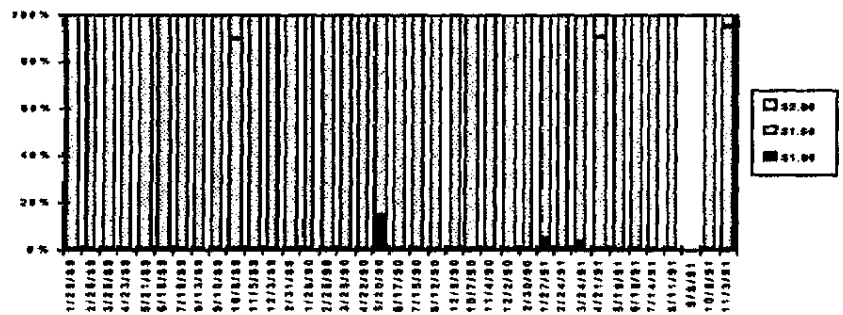


MONTCLAIR
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS

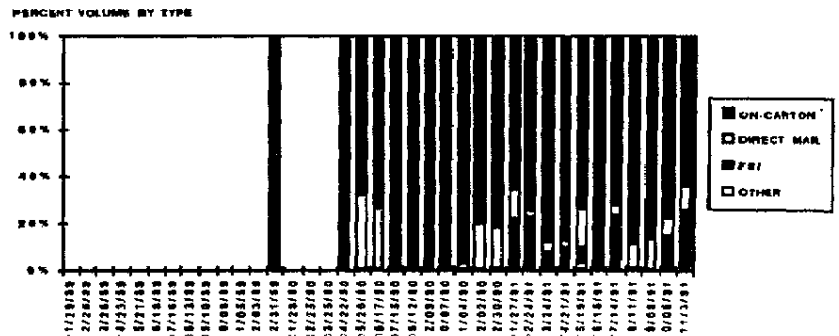


2073132281

MONTCLAIR
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

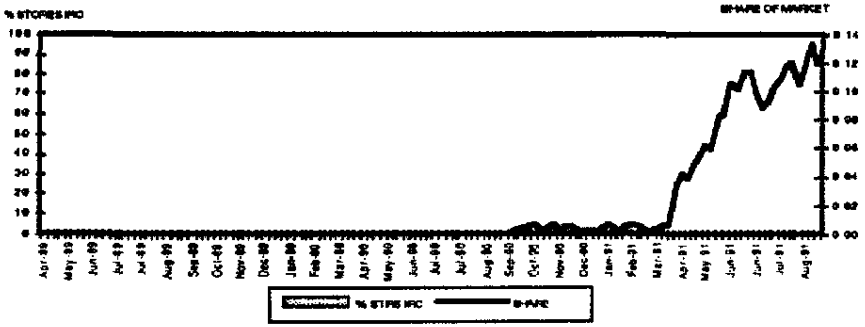


MONTCLAIR
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

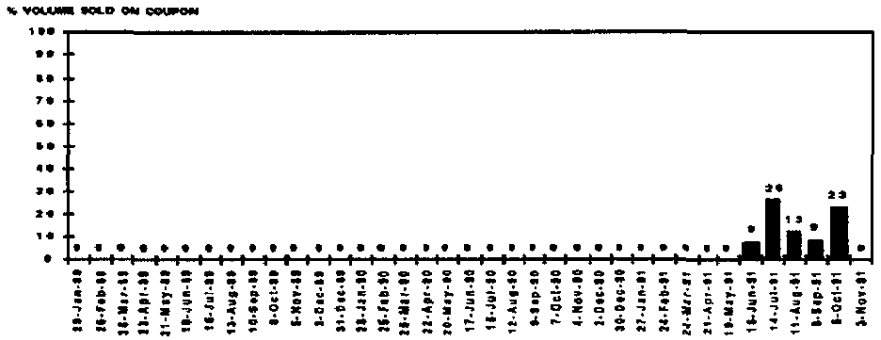


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

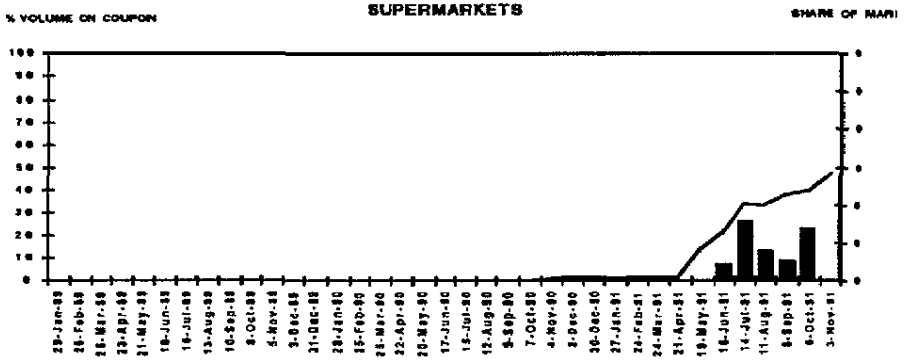
BULL DURHAM
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



BULL DURHAM
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



BULL DURHAM
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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BULL DURHAM
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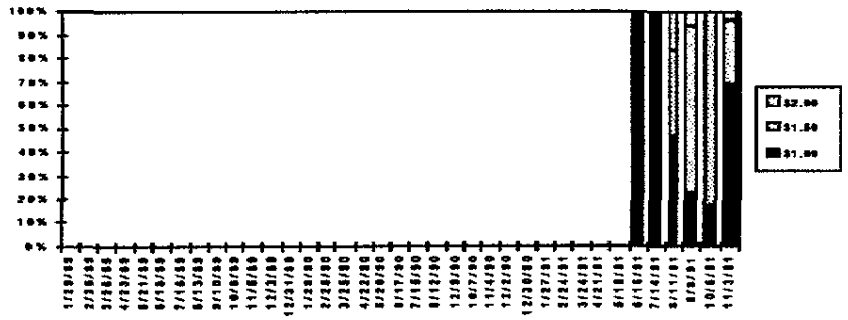
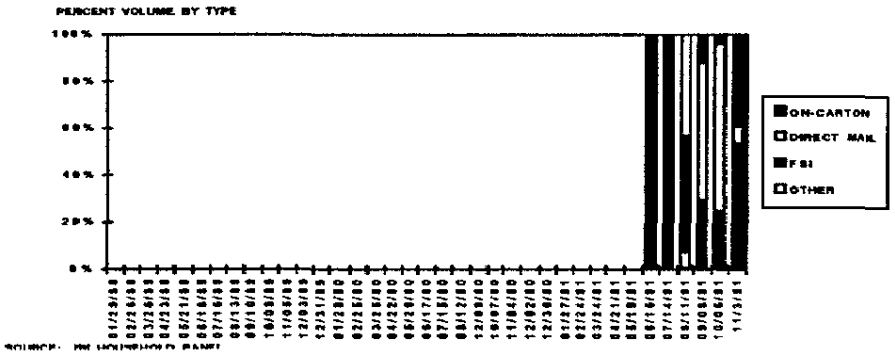
SUPERMARKETS

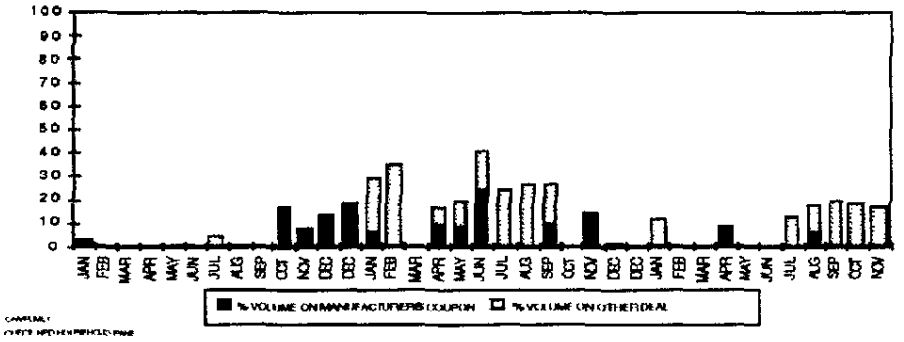


BULL DURHAM
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

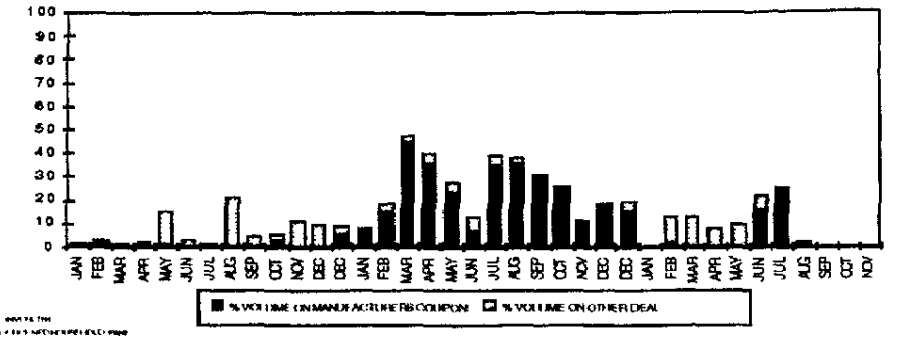


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

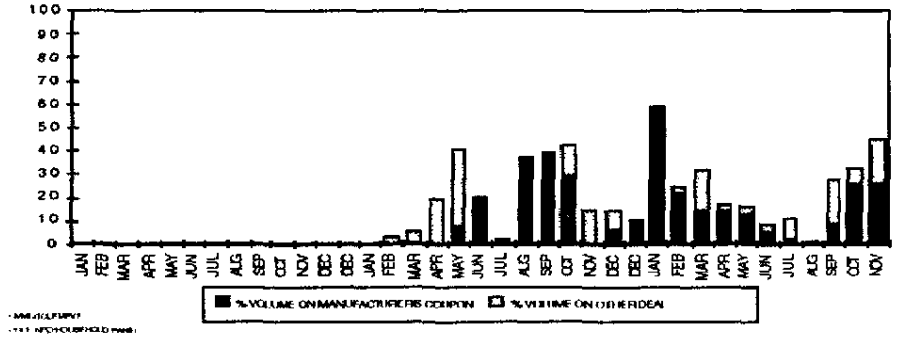
PALL MALL
DEAL ACTIVITY
CONVENIENCE



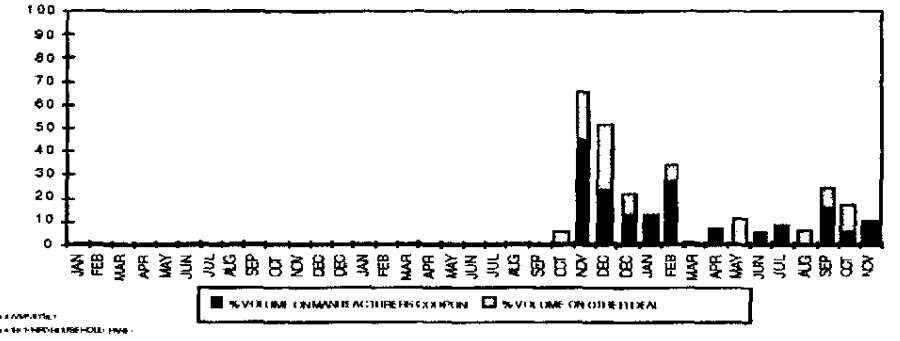
CARLTON
DEAL ACTIVITY
CONVENIENCE



MONTCLAIR FM/PV
DEAL ACTIVITY
CONVENIENCE



MISTY SLIMS
DEAL ACTIVITY
CONVENIENCE



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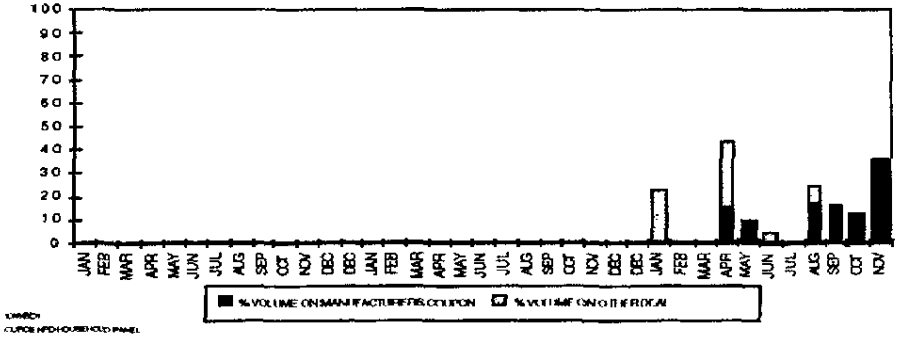
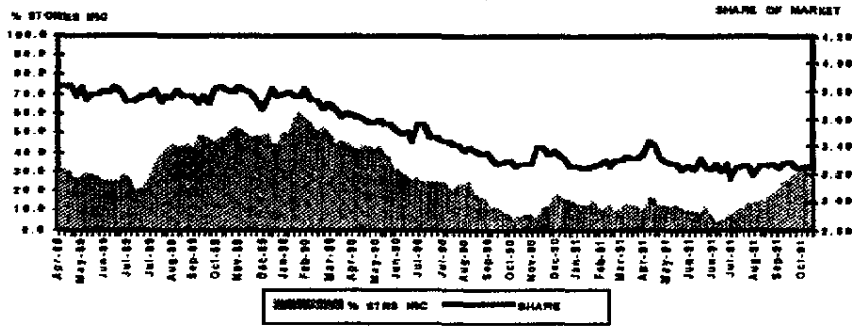
BULL DURHAM
DEAL ACTIVITY
CONVENIENCE

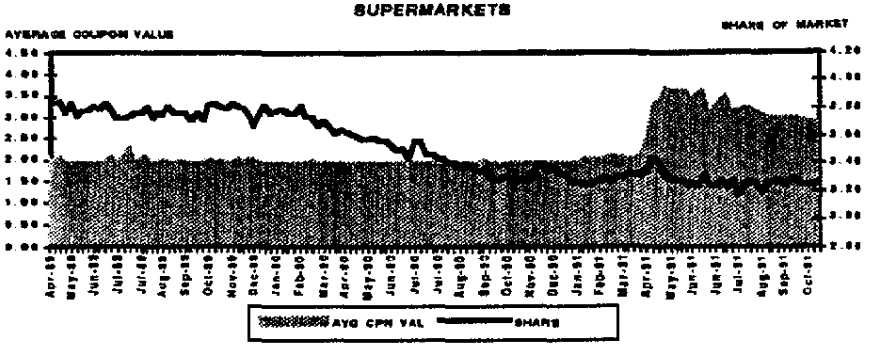


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

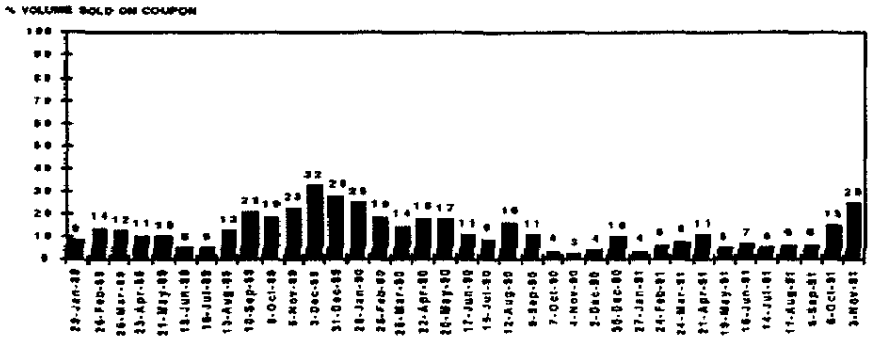
KOOL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



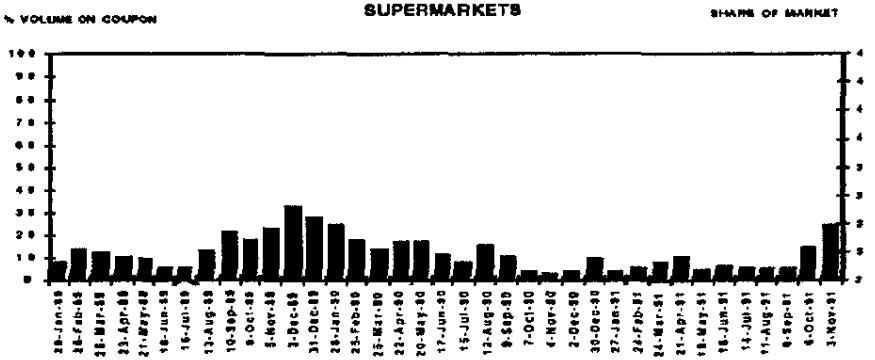
KOOL
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



KOOL
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



KOOL
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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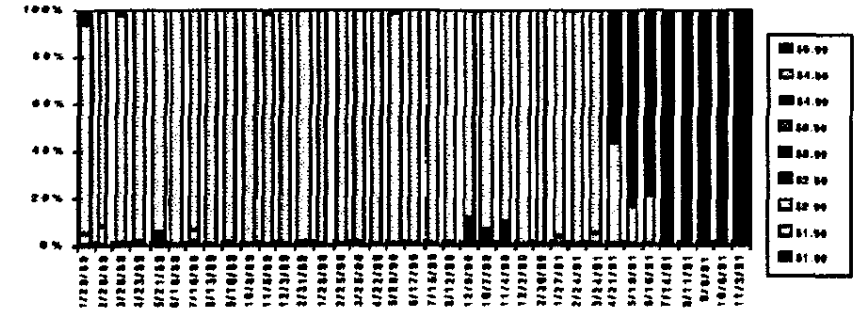
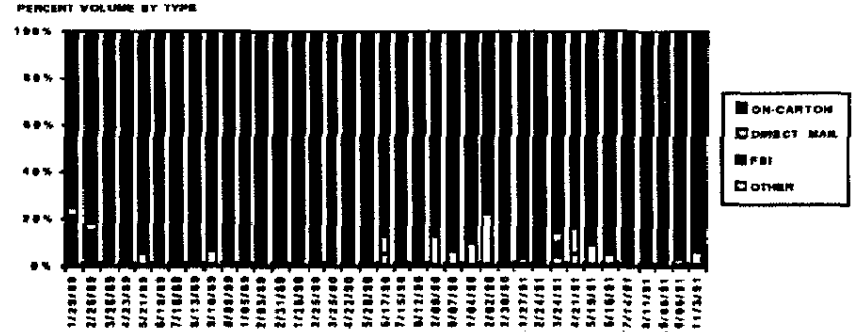
KOOL
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

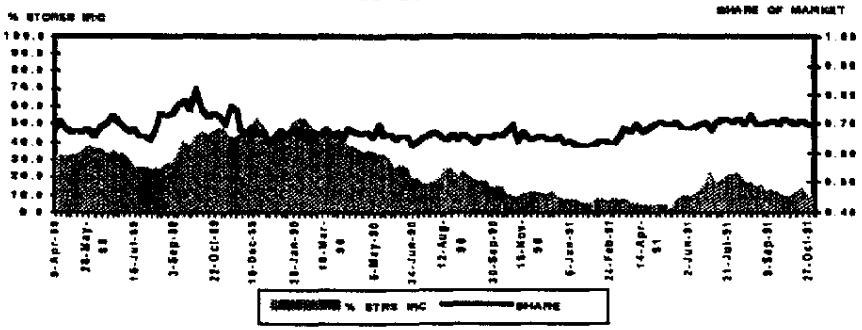


KOOL
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

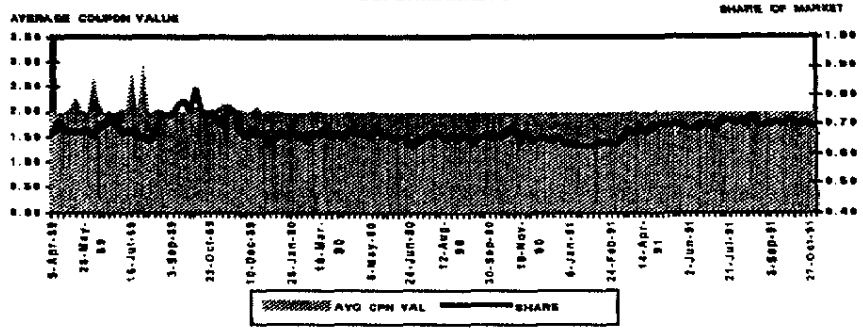


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

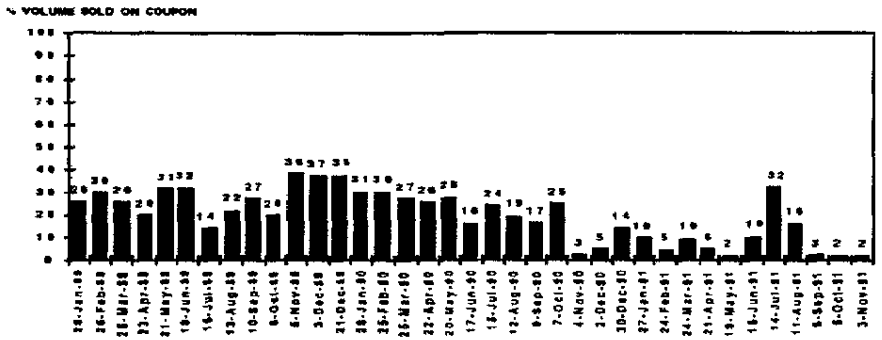
CAPRI
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



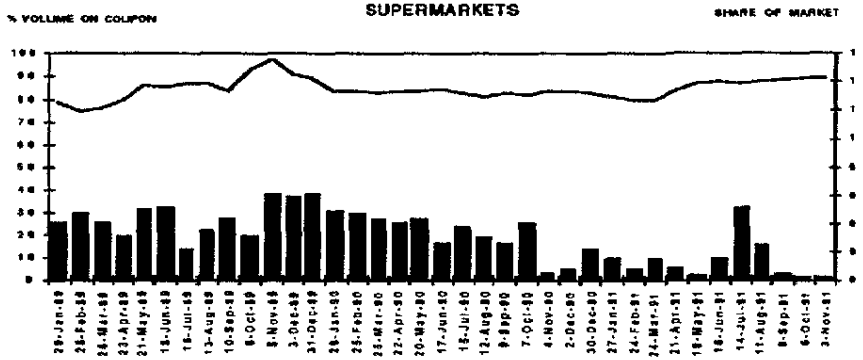
CAPRI
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



CAPRI
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



CAPRI
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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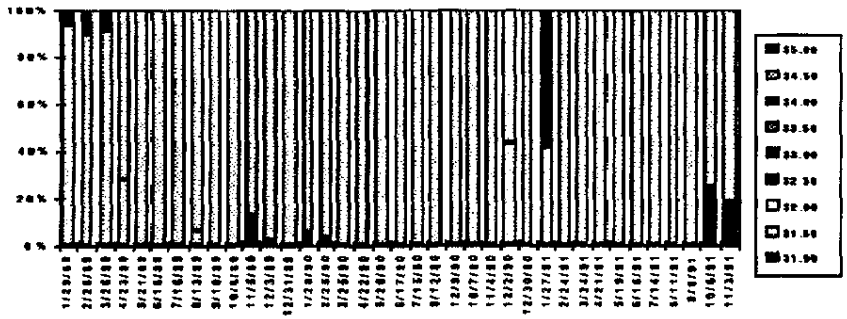
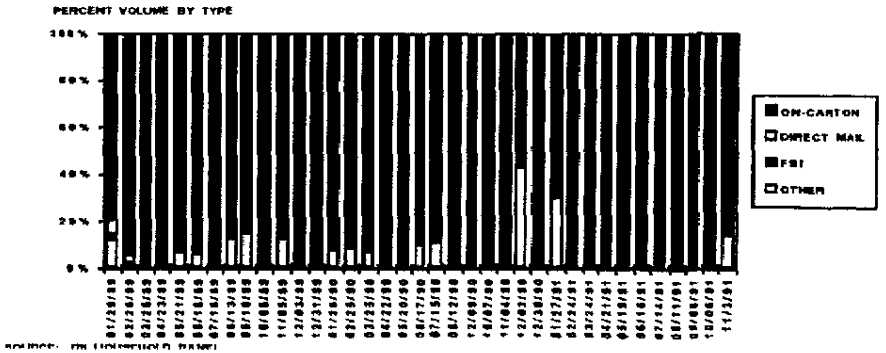
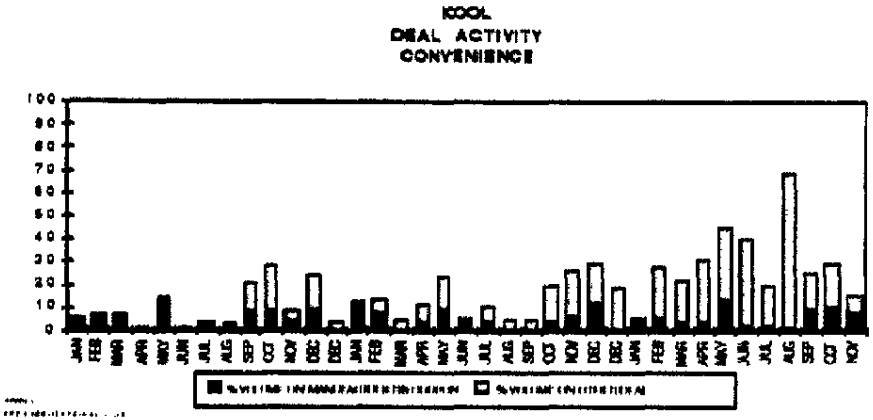
CAPRI
ACENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

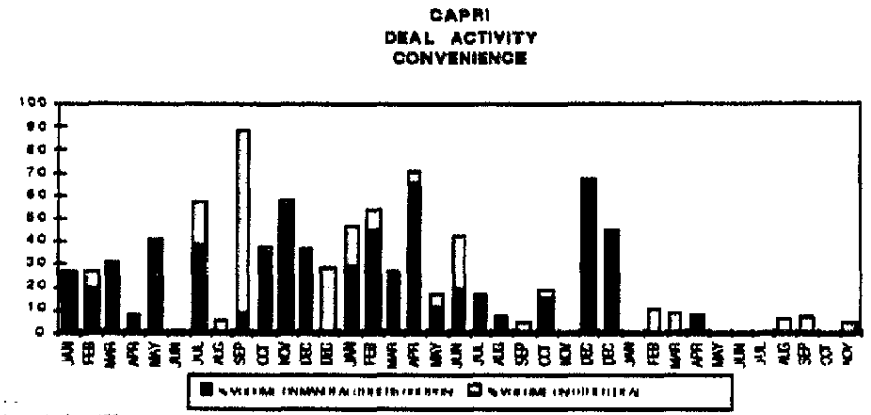


CAPRI
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004





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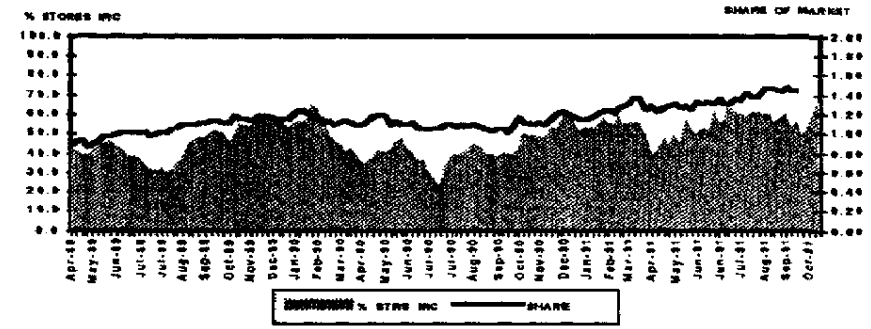
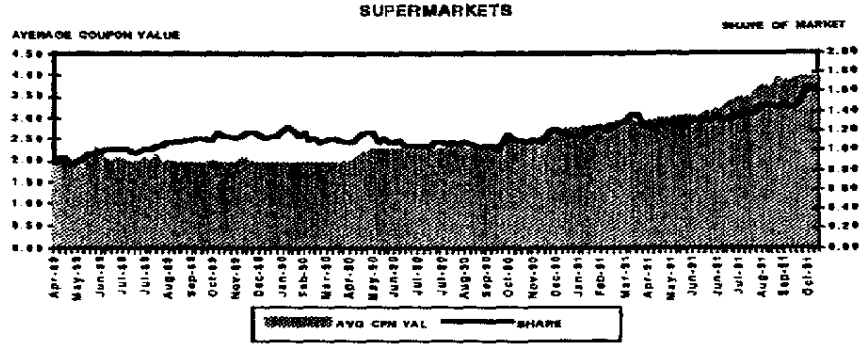
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

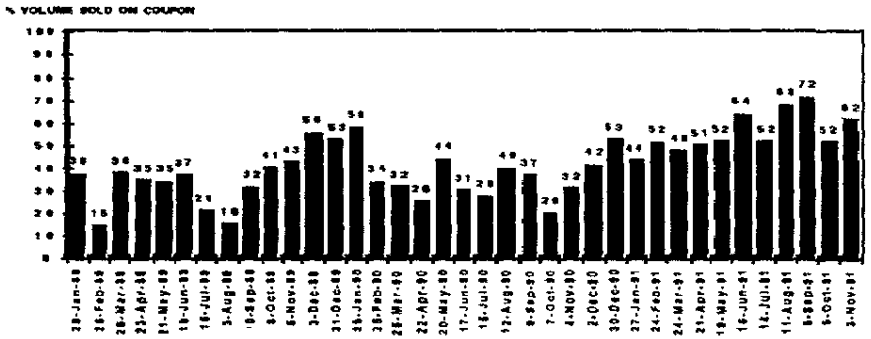
VICEROY
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



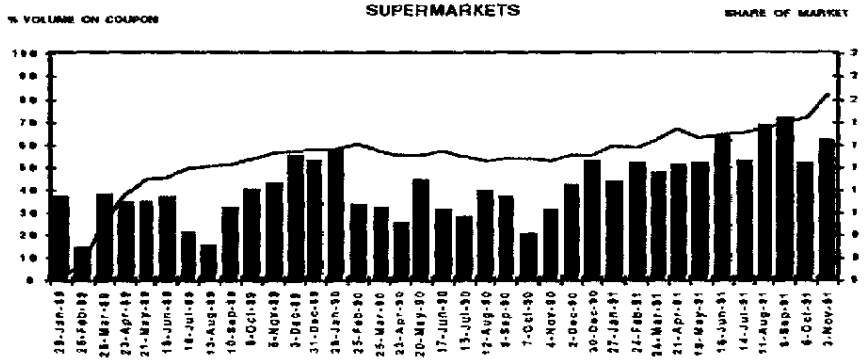
VICEROY
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



VICEROY
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



VICEROY
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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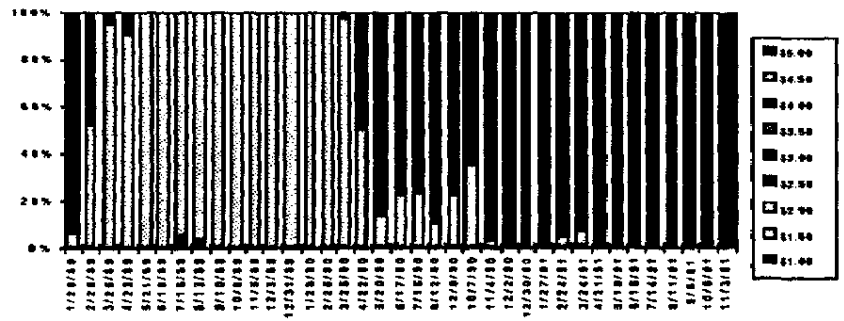
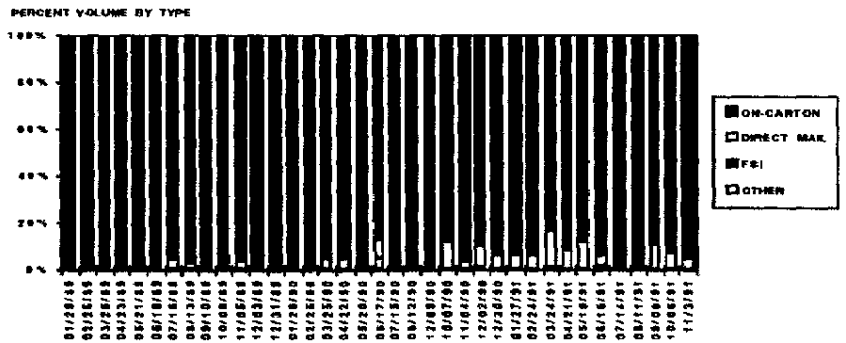
VICEROY
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

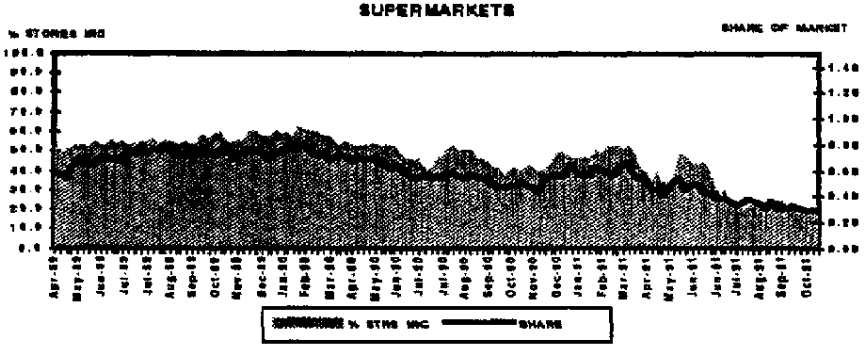


VICEROY
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

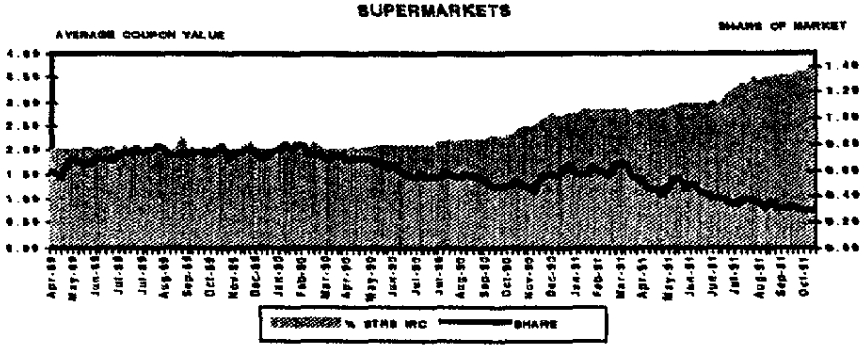


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

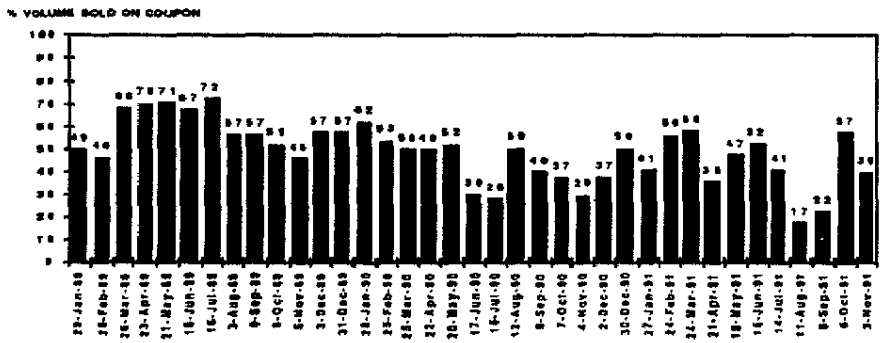
RICHLAND 20'S
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



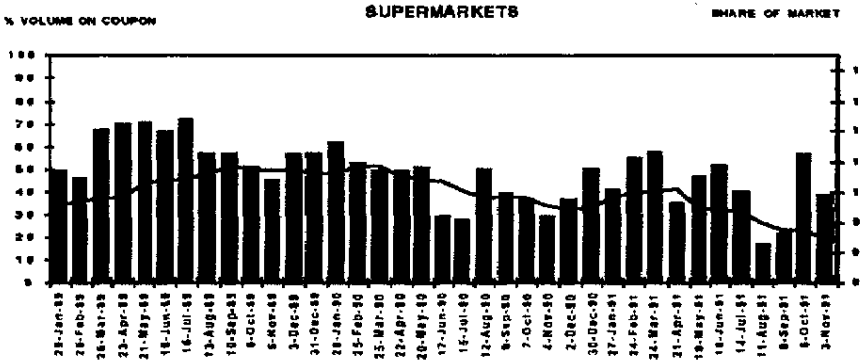
RICHLAND 20'S
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



RICHLAND 20'S
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



RICHLAND 20'S
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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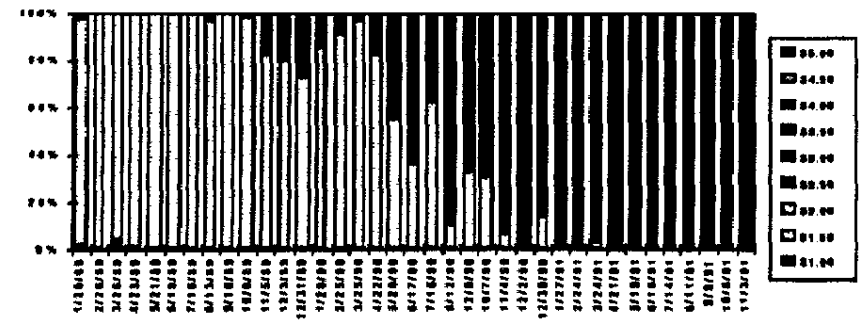
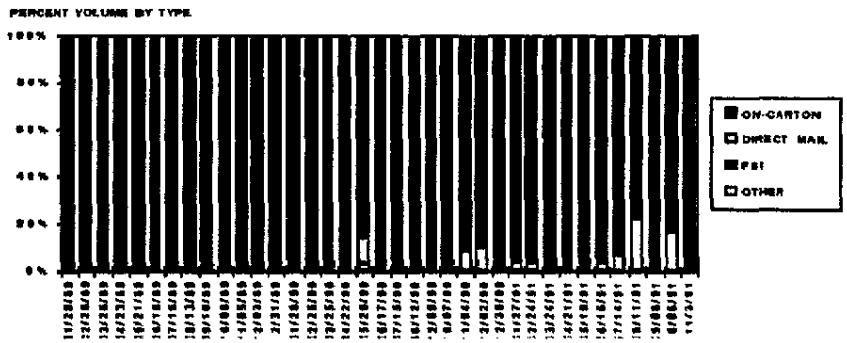
RICHLAND 20'S
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

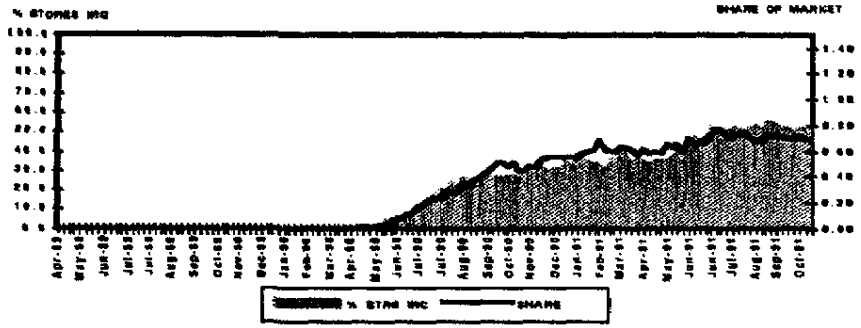


RICHLAND 20'S
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

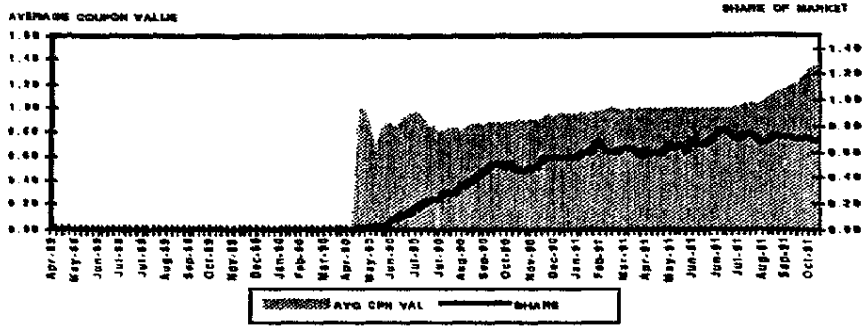


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

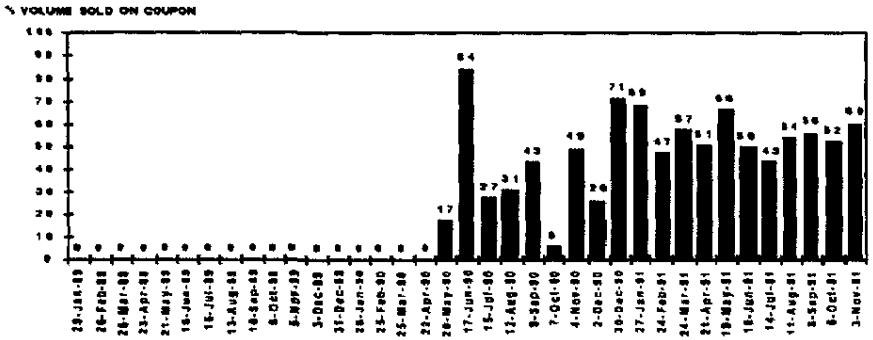
RALEIGH EXTRA
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



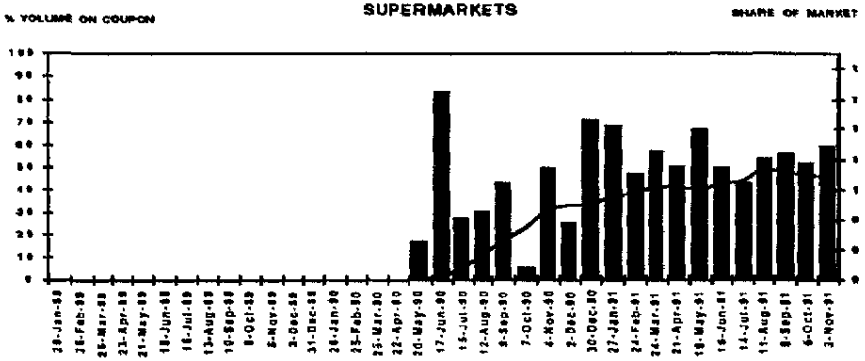
RALEIGH EXTRA
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



RALEIGH EXTRA
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



RALEIGH EXTRA
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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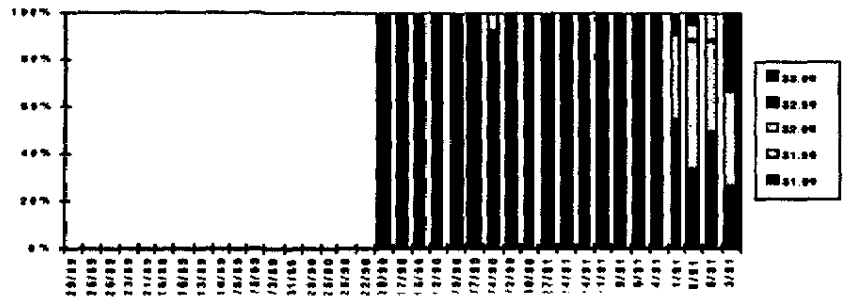
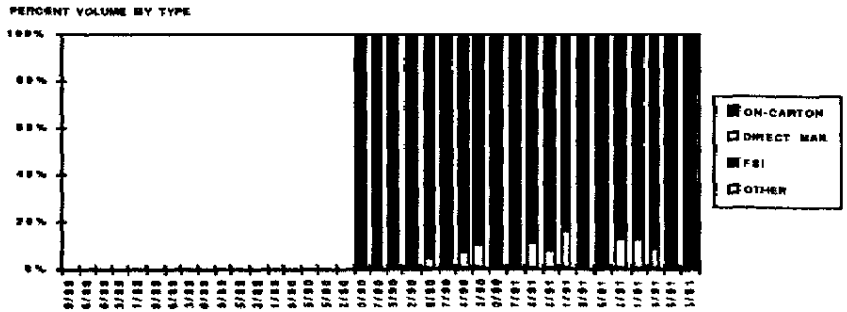
RALEIGH EXTRA
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

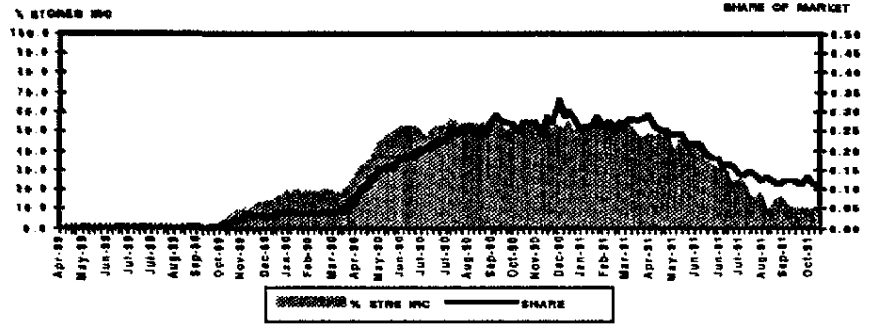


RALEIGH EXTRA
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS

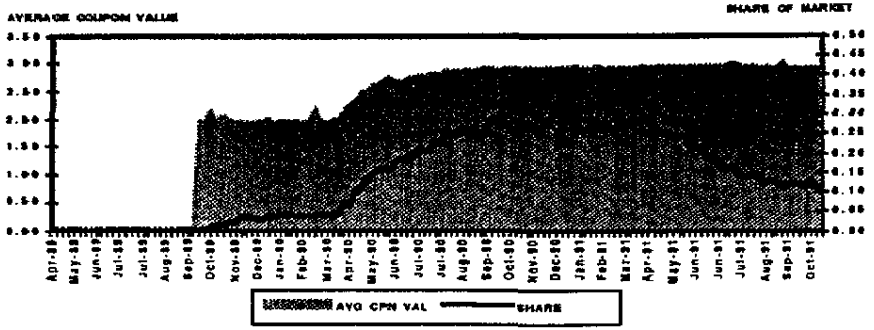


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

BELAIR PV
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



BELAIR PRICE VALUE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



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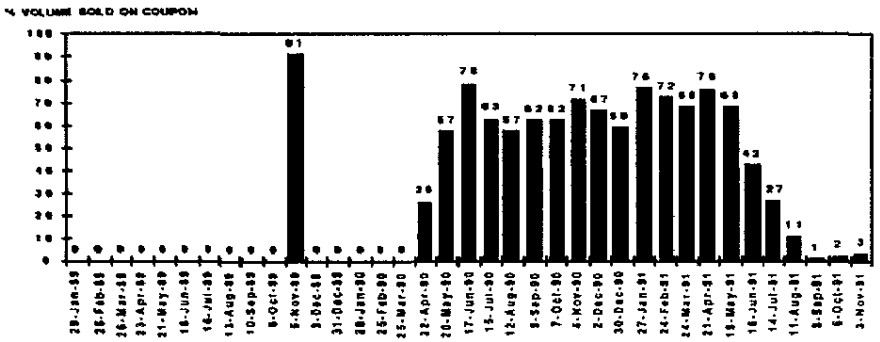
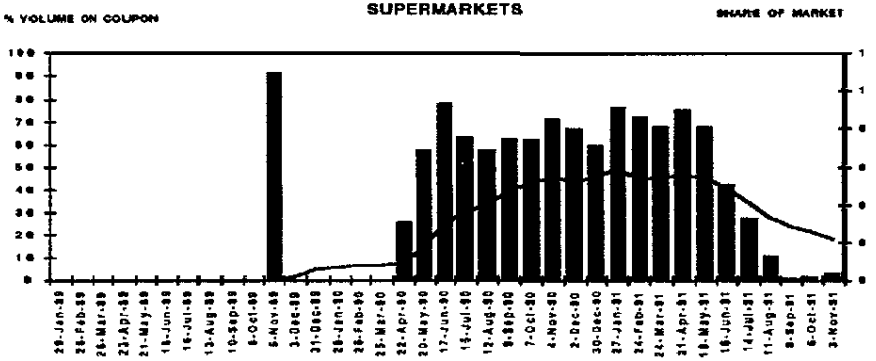
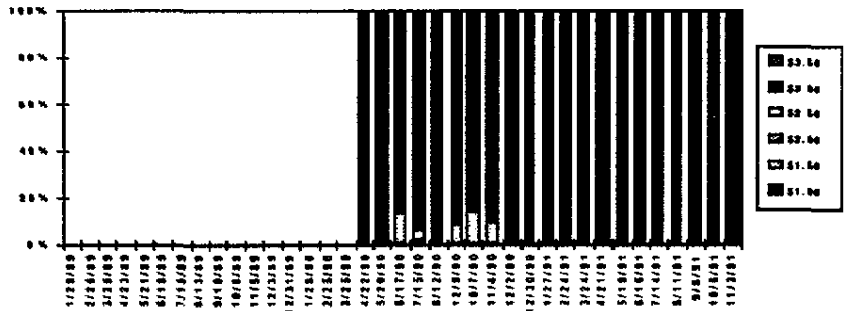
BELAIR PV
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



BELAIR PRICE VALUE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS

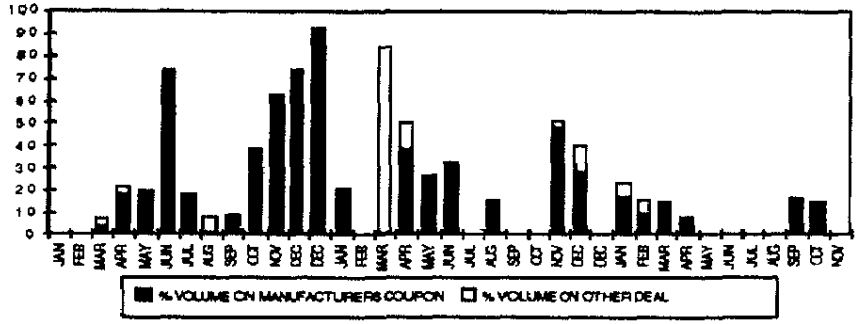


BELAIR PRICE VALUE
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

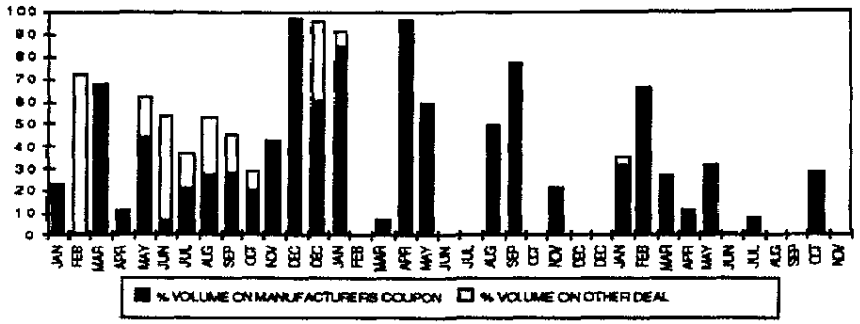


Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

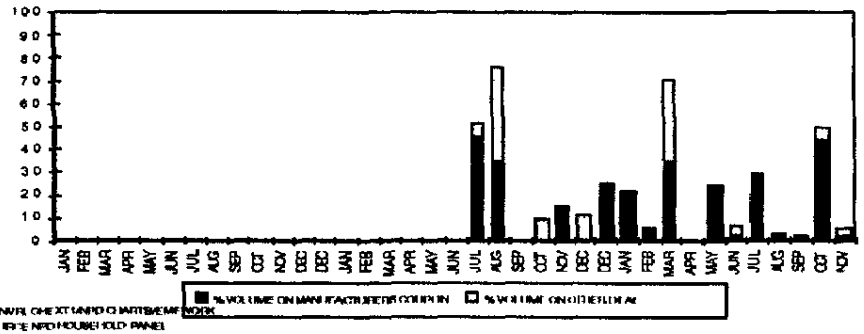
VICEROY
DEAL ACTIVITY
CONVENIENCE



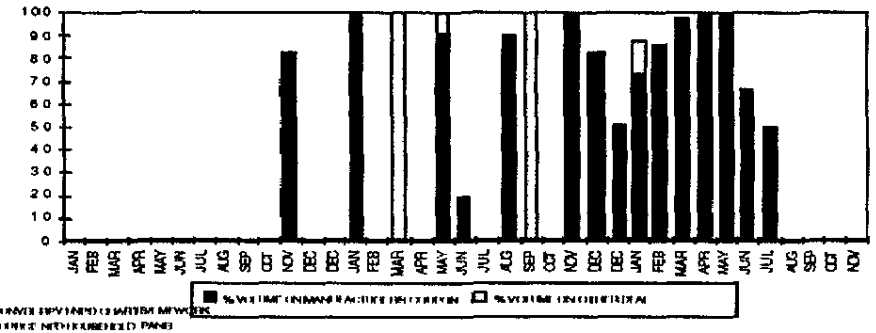
RICHLAND 20
DEAL ACTIVITY
CONVENIENCE



RALEIGH EXTRA
DEAL ACTIVITY
CONVENIENCE



BELAIR PV
DEAL ACTIVITY
CONVENIENCE



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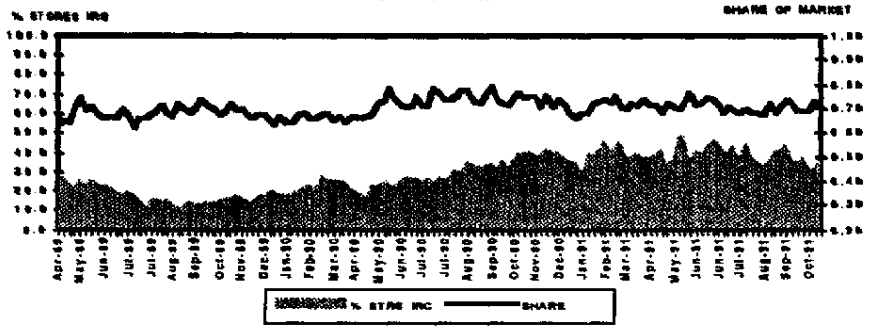
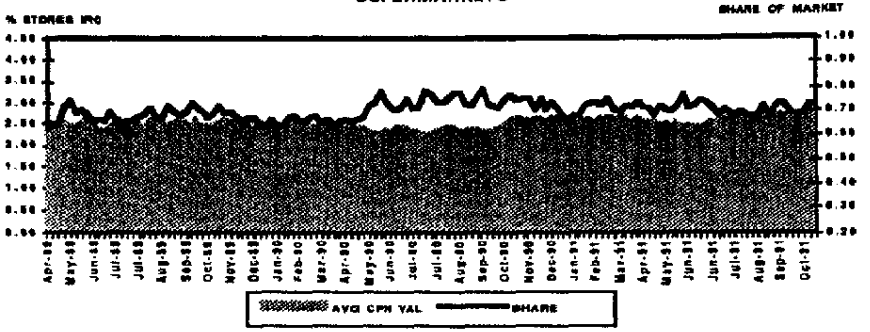
Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

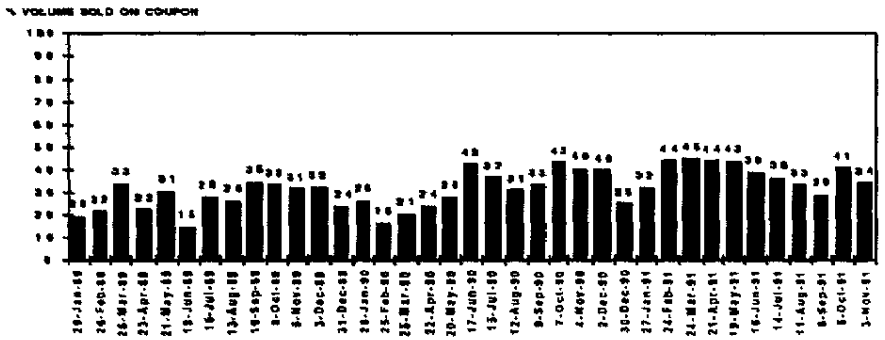
EVE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



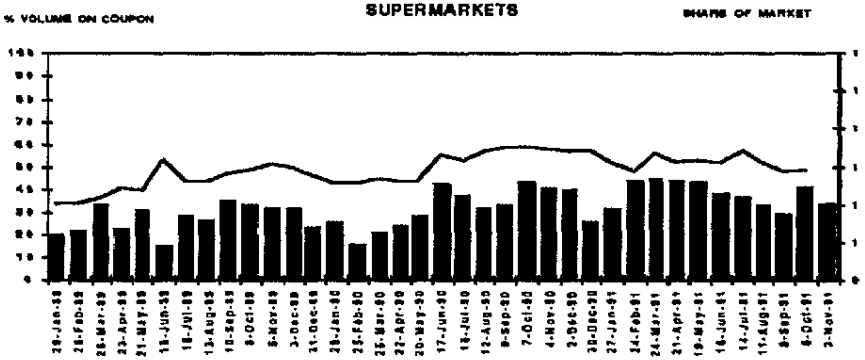
EVE
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



EVE
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



EVE
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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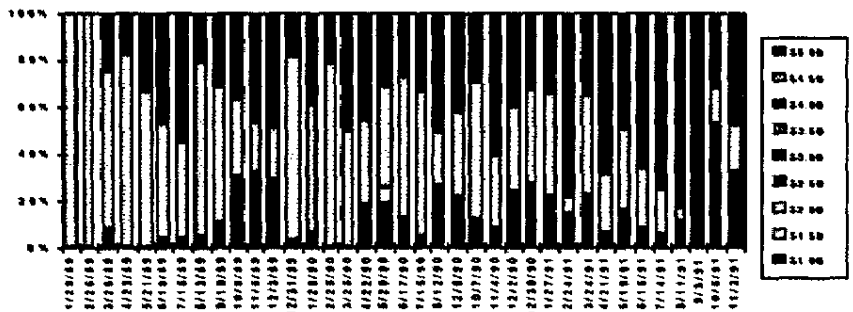
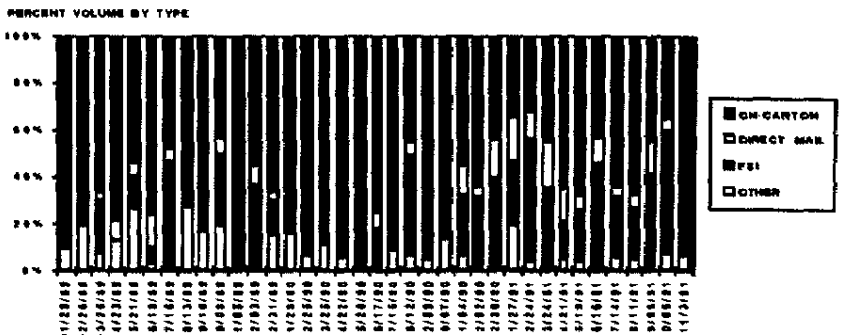
EVE
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS

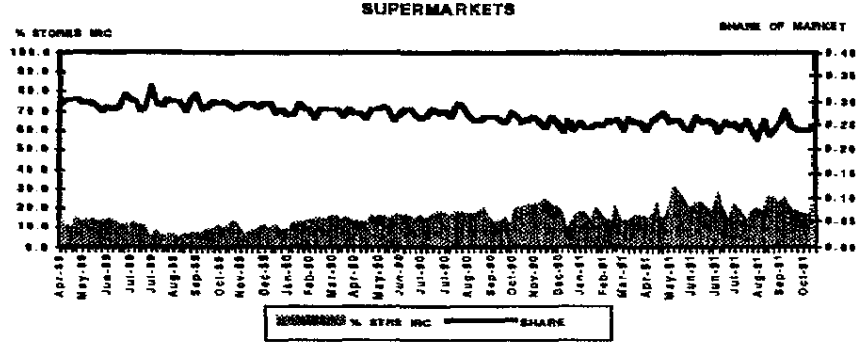


EVE
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



Source: https://www.industrydocuments.ucsf.edu/docs/trym0004

LARK
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING SEPTEMBER 8, 1991
SUPERMARKETS



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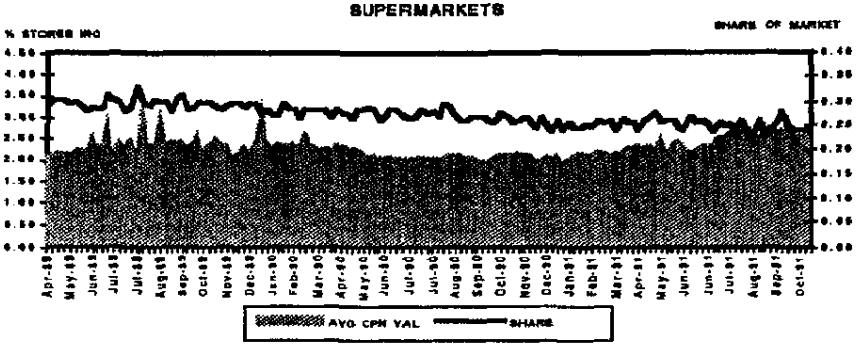
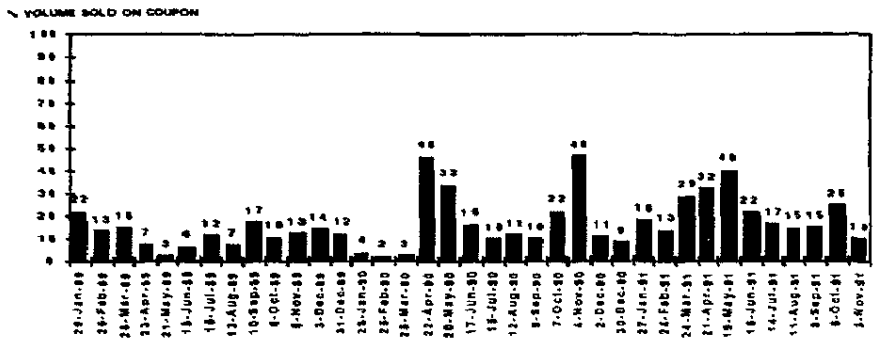
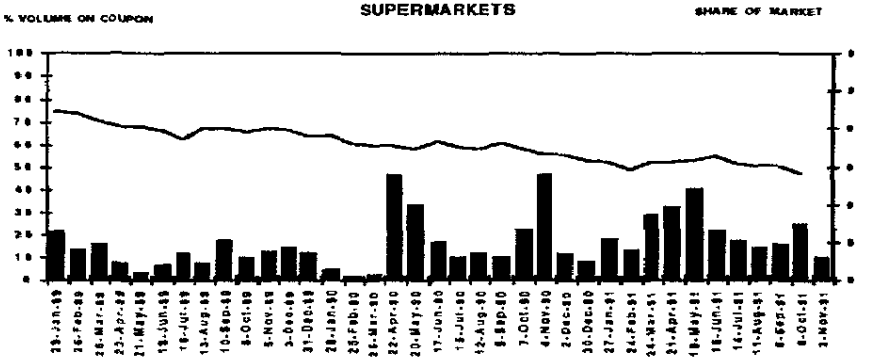
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



LARK
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



LARK
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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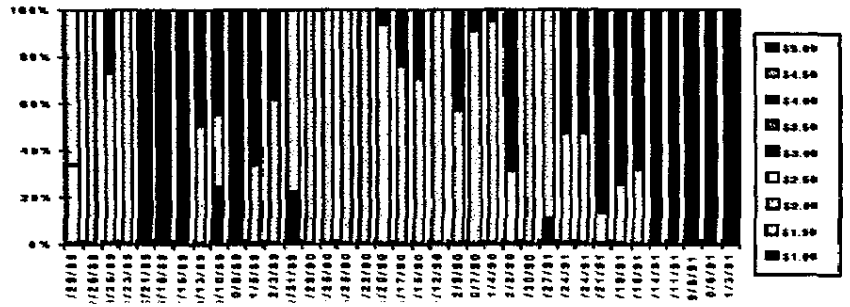
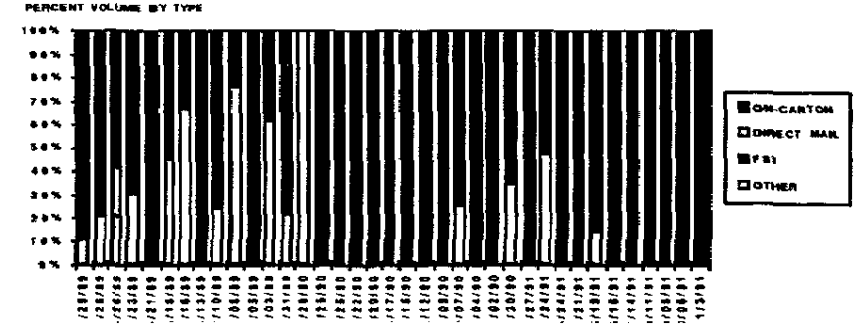
LARK
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



LARK
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



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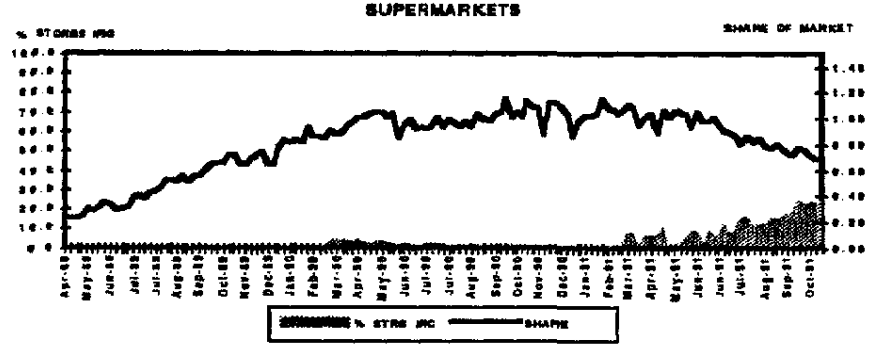
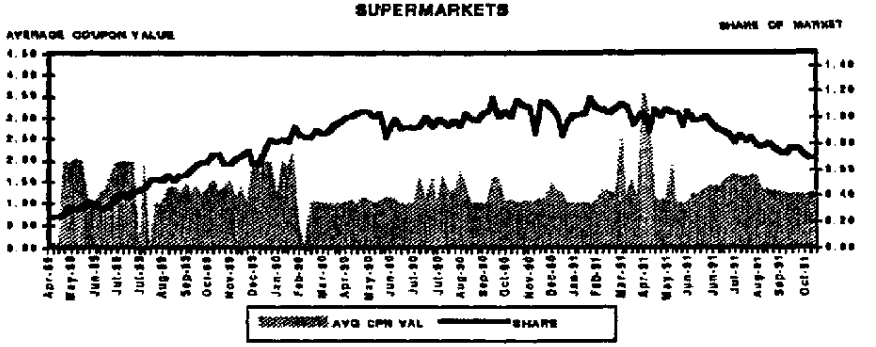
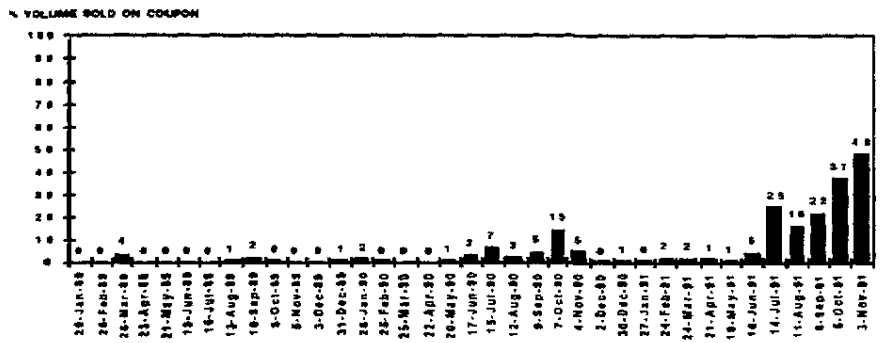
PYRAMID
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



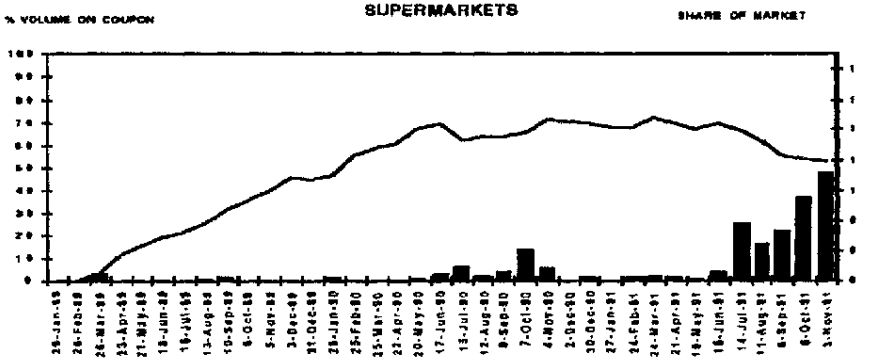
PYRAMID
IN-STORE PROMOTIONAL ACTIVITY
TOTAL US: WEEK ENDING NOVEMBER 3, 1991
SUPERMARKETS



PYRAMID
PERCENT VOLUME SOLD ON COUPON
SUPERMARKETS



PYRAMID
THE IMPACT OF COUPON ACTIVITY ON SHARE TRENDS
SUPERMARKETS



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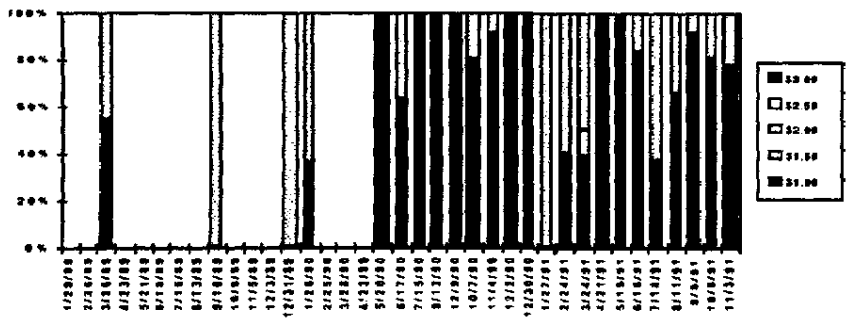
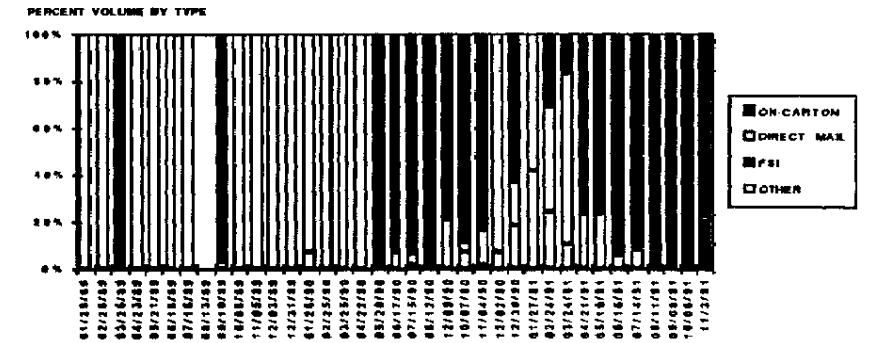
PYRAMID
PERCENT VOLUME SOLD ON COUPON BY VALUE
SUPERMARKETS



PYRAMID
PERCENT VOLUME ON COUPON BY TYPE
SUPERMARKETS



SOURCE: IRI HOUSEHOLD PANEL

Source: https://www.industrydocuments.ucsf.edu/docs/trym0004